

E-TRADE Account Aggregation Overview and Guide

View All Your Investments in One Place

Keeping track of your financial accounts is easier when you can see everything in one place.

Through your Morgan Stanley E*TRADE account, you can securely link eligible external financial accounts to create a consolidated view of your finances. This optional feature allows you to monitor your accounts from a single dashboard, making it easier to track your overall financial picture.

Benefits Include:

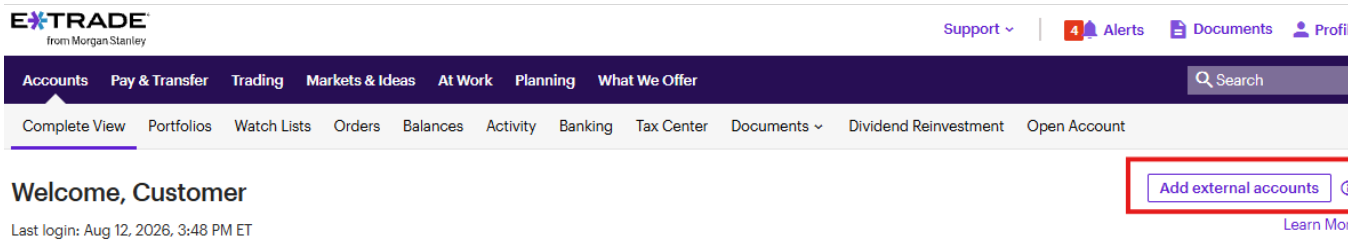
- View eligible investment and financial accounts in one place.
- Get a more complete picture of your overall financial portfolio.
- Save time by reducing the need to log in to multiple financial institutions.
- Monitor your assets through a single, convenient dashboard.

Your Information stays private

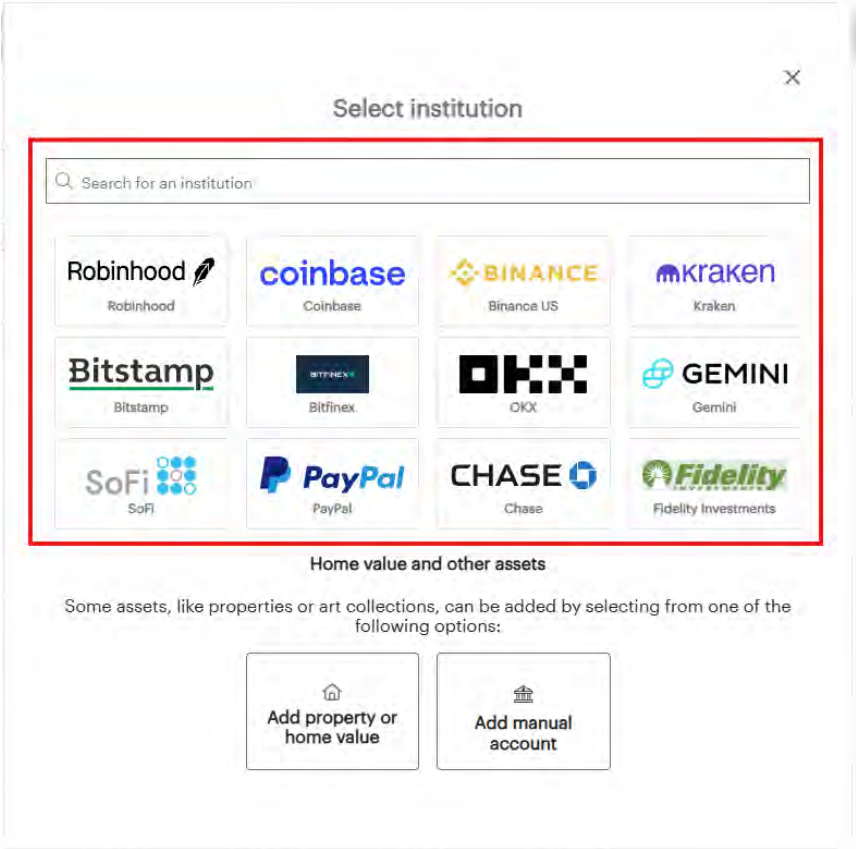
Linking external accounts is completely optional, and only you can access your linked account information. Lineage cannot view or access your personal financial data.

How to Add an External Account

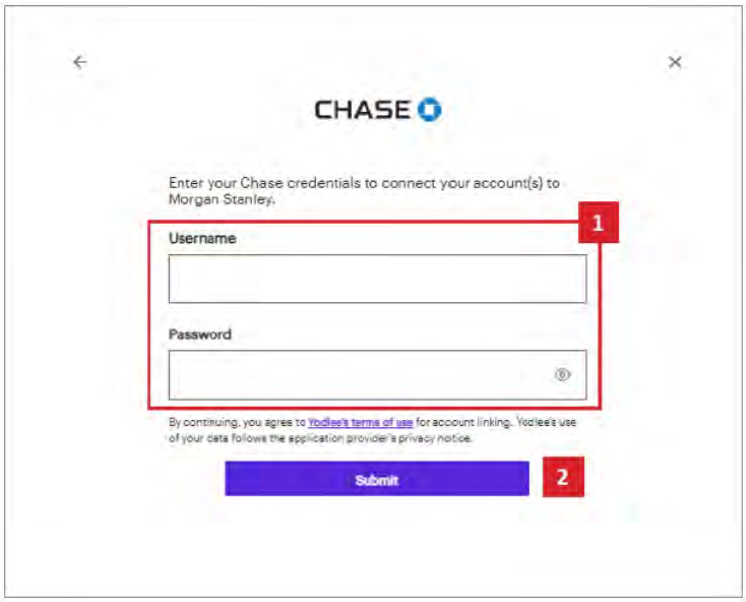
1. From the **Complete View** page, select **Add External Accounts**.



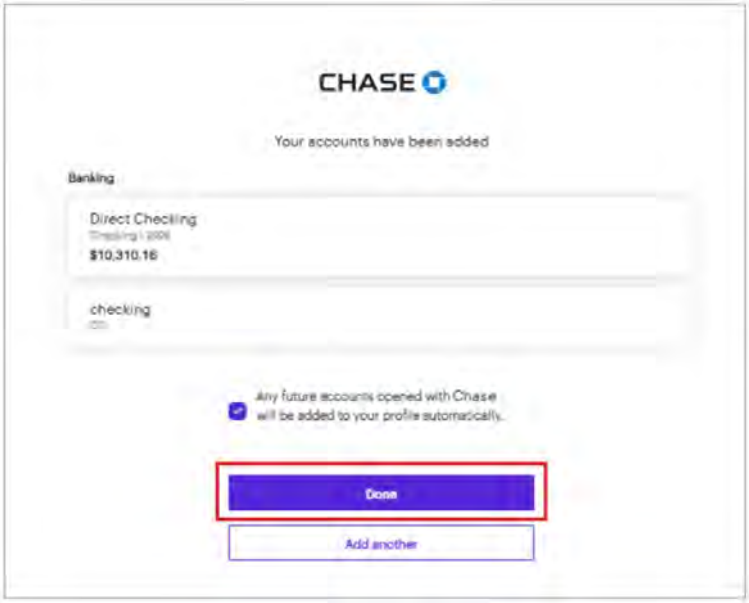
2. Search for your financial institution or choose one from the list of popular institutions.



3. Enter the username and password you use for that financial institution, then select **Sign in**.



4. Review the information displayed and select **Done** to complete the setup.



Result: Your linked account will appear in the **External Accounts** section of your Complete View dashboard.

Frequently Asked Questions

Keeping track of your financial accounts is easier when you can see everything in one place.

Q: Where can I find more information about this process?
A: For more information about adding and managing external accounts in E*TRADE, please visit Total Wealth View: Add External Accounts | E*TRADE

Q: Is this required?
A: No. Linking external accounts is completely optional.

Q: What types of accounts can I link?
A: You can link eligible personal financial accounts from participating financial institutions, including investment, retirement, and bank accounts.

Q: Can Lineage see my linked accounts?
A: No. Your linked accounts and financial information are only accessible by you through your personal Morgan Stanley E*TRADE account.

Q: Does Lineage receive any of my personal financial information?
A: No. This feature operates entirely within Morgan Stanley E*TRADE. Lineage does not receive, access, or store any information from your linked personal accounts.

Q: Can I remove a linked account later?
A: Yes. You can manage or remove your linked external accounts directly within your Morgan Stanley E*TRADE account at any time.

This guide is provided by Lineage for general informational purposes only and is intended to help team members navigate the external account aggregation feature available through Morgan Stanley E*TRADE. The feature is provided and maintained by Morgan Stanley E*TRADE and is subject to its applicable terms, conditions, functionality, and security practices.
Lineage does not administer, control, or have access team members' linked external financial accounts or their login credentials. Lineage is not responsible for the security of the external account aggregation feature or for any issues related to linked external accounts.
Team members should contact Morgan Stanley E*TRADE directly for questions, technical assistance, or issues related to this feature.