**Email 1: Invitation to Link Accounts**

**From: Advisor … To: Investor**

Subject: Inviting You to Link Accounts for Holistic Financial View

Hello <<first name>>,

I’m excited to share a feature that will allow you to view your entire financial picture and enable me to optimize your personalized plan to meet your investment goals. Please take a moment to learn about this feature and get started by linking your accounts. It’s fast, easy, and secure.

The account linking process is simple and can be completed in a few simple steps:

1. Go to <<link>>
2. Search for your financial institution(s)
3. Enter your credentials
4. Select the accounts to link

View this one-minute video for more details.

The account linking feature is powered by Morningstar ByAllAccounts, an investment-first data aggregator that prioritizes the security and privacy of your data.

Please let me know if you have any questions about this new feature or the account linking process.

Best Regards,

<<Advisor Name>>

<<Advisor Email Signature>>

**Email 2: Benefits of Linking All Accounts**

**From: Advisor … To: Investor**

Subject: Reminder: Benefits of Sharing Your Full Financial Life

Hello <<first name>>,

As a follow-up to my previous email introducing our account linking feature, I want to encourage you to take full advantage of this tool.

By linking all your accounts on our client portal, it makes it possible for you to view your finances in one place, giving you a holistic view of your wealth. Entrusting me as your advisor with this information will allow me to create a more actionable and personalized plan and ensure that together we’re making progress toward your financial goals.

View this one-minute video for a quick tutorial on how to link your accounts.

The link account feature is powered by Morningstar ByAllAccounts, an investment-first data aggregator that prioritizes the security and privacy of your data.

Please let me know if you have any questions about this new tool or the account linking process.

Best Regards,

<<Advisor Name>>

<<Advisor Email Signature>>

**Email 3: Follow-Up Accounts to Link**

**From: Advisor … To: Investor**

Subject: Reminder: Link All Your Financial Accounts

Hello <<First Name>>,

As a follow-up to my previous emails introducing our new account linking feature, I want to encourage you to add all your financial accounts. We strongly recommend taking advantage of this feature to its full potential—and to ensure all your key accounts are linked so we can optimize your investment plan for your personalized needs. By linking and sharing your accounts, I can view your finances holistically and help gauge progress toward your goals.

For the best experience, it’s recommended that you link all accounts (both banking and investing) that you feel comfortable sharing. Examples include, but are not limited to, your checking, savings, 401K, brokerage, Roth IRA, etc.

Here’s a link to a short video that provides a quick walkthrough of the feature and how to link accounts. If you have any questions about the benefits and capabilities of linking and sharing your account balances with me, I’m happy to discuss this further.

Best Regards,

<<Advisor Name>>

<<Advisor Email Signature>>

**Pop-up reminders for the client portal:**

* Inviting You to Link Your Accounts for a Full Financial Picture
  + Your advisor recommends taking advantage of this new account linking feature. Learn how to get started here.
* REMINDER: Take Advantage of the Account Linking Feature
  + Get more personalized advice by following these simple steps to link your financial accounts. Contact your financial advisor to learn more.
* Why Should You Link Your Accounts? Get More Personalized Advice!
  + Follow these simple steps to get full access to your financial picture. Click here to get started.
* REMINDER: Link Your Financial Accounts Using This Quick and Easy Process
  + Help your advisor build your personalized plan by linking your accounts today.
* Link Additional Accounts for a Holistic Financial Picture
  + For the best experience, it’s recommended that you link all accounts that you feel comfortable sharing with your advisor.