

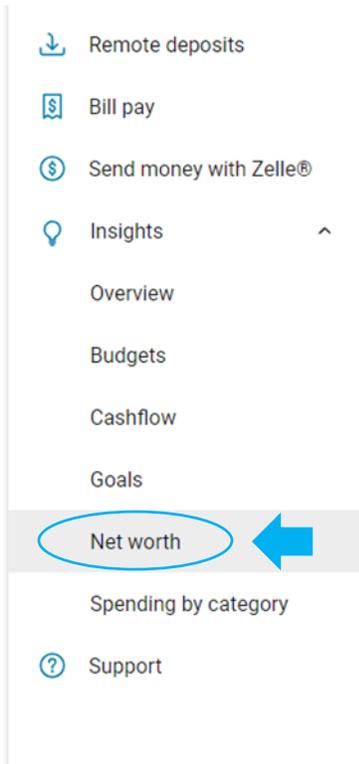


# GEEZEO: HOW TO LINK OTHER ASSETS AND LIABILITIES

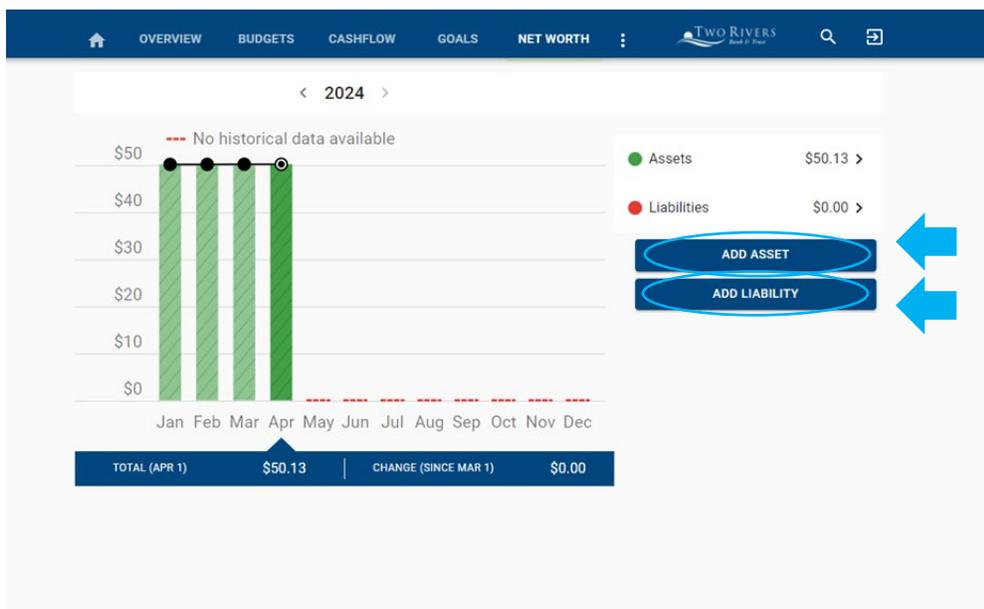
A Step-By-Step guide

Member  
**FDIC**

**Step 1: Expand the Insights/Geezeo menu and click “Net worth.”**



**Step 2: Click the “Add Asset” button to add an account with deposits from another institution. Or click the “Add Liability” button to add a loan from another institution.**



**Step 3: Next, you will see all of the assets or liabilities held at Two Rivers Bank & Trust. Then, you will click “Link Account” and then click “Next.”**

Total Assets	\$50.13	
Sav B 0004	\$40.23 >	Linked Asset
Sally Checking	\$9.90 >	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.

**LINK ACCOUNT** ←

Unlinked Asset

Name \*

Amount \*

\$

CANCEL SAVE

With your permission, **Two Rivers Bank & Trust** uses **Finicity, a Mastercard company** who will securely access, process and share requested financial data with your app or service.

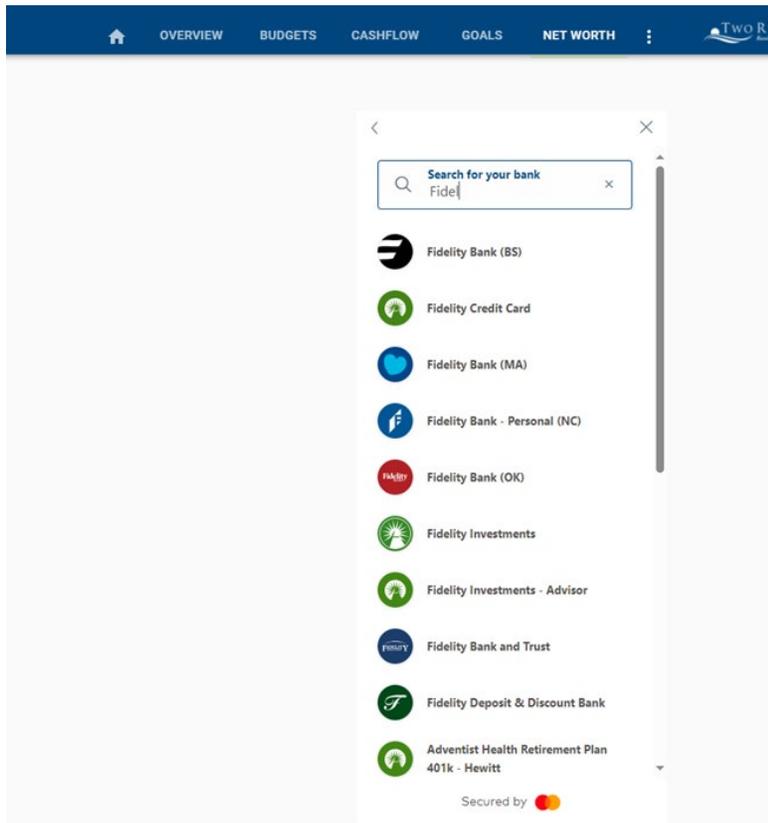
- Your provided data is encrypted
- Your data will only be used with your permission

By pressing **Next**, you agree to Finicity's [Terms and Conditions](#) and [Privacy Notice](#) of

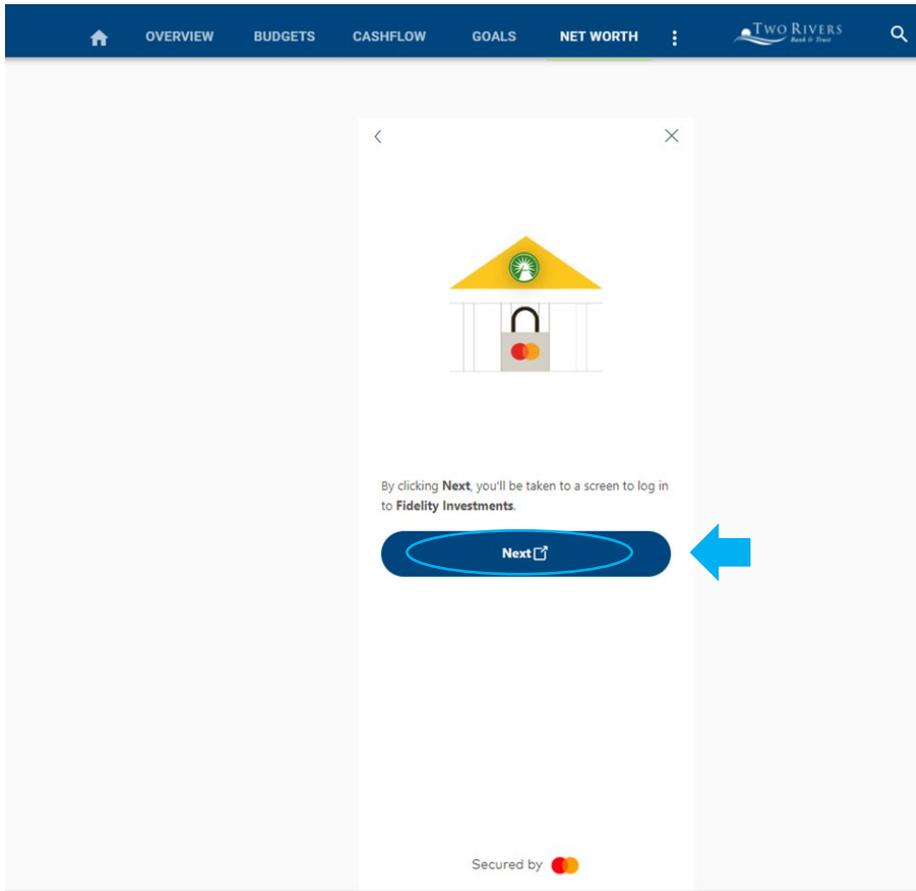
**Next** ←

Secured by

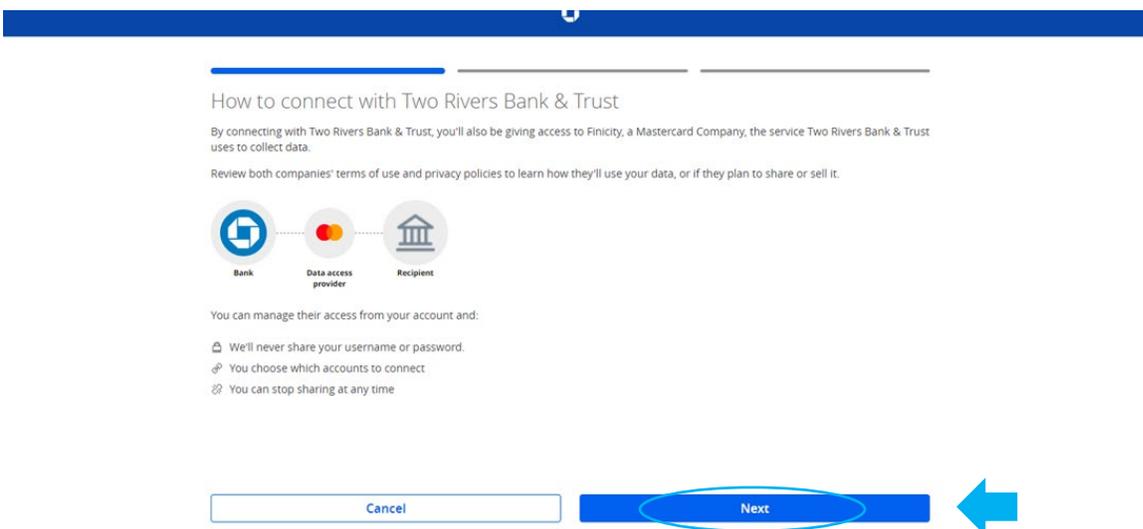
**Step 4: Then, you will begin typing the first few letters of the institution name you wish to connect. Matches from a list should appear.**



**Step 5: Next, you will be prompted to click “Next” to log-in to that institutions’ site.**



**Step 6: Review the screen and click “Next.”**



## Step 7: Review and click “Next.”

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What Two Rivers Bank & Trust wants to know

- ▶ Balances, transactions and rewards
- ▶ Account names, types and other details

←

## Step 8: Review and click “Connect my account(s)” to connect the accounts listed.

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What do you want to share?

These are all the accounts that can be shared with Two Rivers Bank & Trust:

- CREDIT CARD (...3709)

Include new, eligible accounts automatically  
This also includes replacement accounts for lost or stolen credit cards, if applicable.

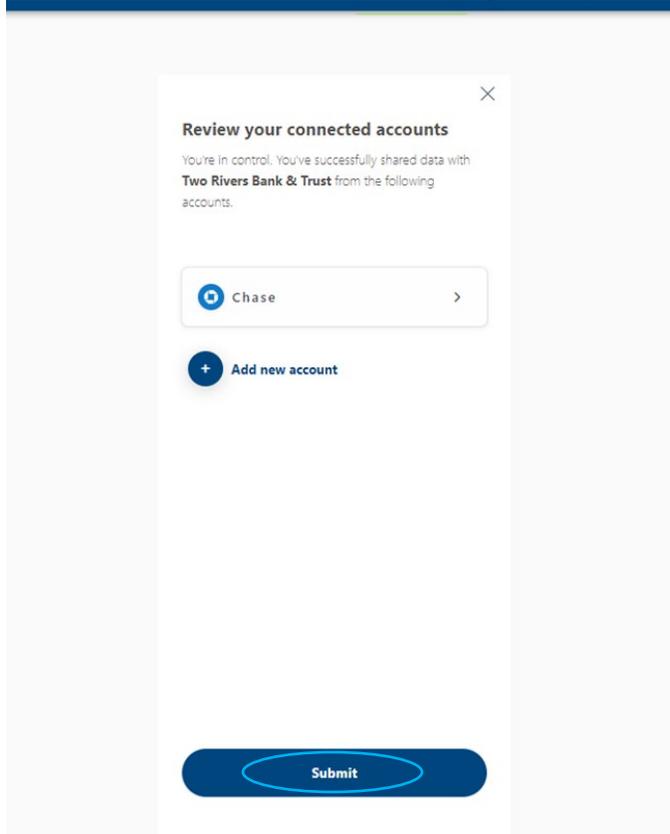
Data you'll share with them:

- Balances, transactions and rewards
- Account names, types and other details

By choosing "Connect my account(s)" you consent to share this data with Two Rivers Bank & Trust via Fincity, a Mastercard Company. Once you do, we'll sign you out and return you to Two Rivers Bank & Trust.

←

## Step 9: Review and click “Submit.”



## Step 10: Finally, you will be directed back to your Net Worth page and the connected accounts will appear.

The screenshot shows the "NET WORTH" page in a financial application. The page has a dark blue header with navigation tabs: HOME, OVERVIEW, BUDGETS, CASHFLOW, GOALS, NET WORTH, and a search icon. Below the header, there are two tabs: "ACTIVE" and "INACTIVE". The "ACTIVE" tab is selected. The main content area displays a list of accounts with their balances and a right-pointing arrow next to each balance.

Account Name	Balance
Cash	\$50.13
Sally Checking Checking	\$9.90
Sav B 0004 Savings	\$40.23
Credit Cards	\$1,185.71
CREDIT CARD Chase	\$1,185.71

## **How to Remove a Linked Account**

**Step 1: Click “Link Account” from the Net Worth screen.**

**Step 2: Click “Accept Terms and Conditions” disclosure.**

**Step 3: Next, on the Find Your Bank screen, you will see your bank connections listed.**

**Step 4: Click “Review.”**

**Step 5: Click on the account you wish to remove.**

**Step 6: Then, click “Remove Bank.”**

**Step 7: Finally, click “Remove Bank” a second time.**

**Step 8: The account has been removed.**