



GET THE FULL PICTURE

Total Wealth View

It's hard to see the complete picture with only half the details. As a Morgan Stanley client, you can conveniently view your accounts from other financial institutions on Morgan Stanley Online or by using the Morgan Stanley Mobile App, giving you a more complete financial picture.



How Will This Benefit Me?

Instead of logging in to multiple sites to see your balances, you can use a single login to easily view and analyze all your finances.



How Will This Enhance My Relationship With My Morgan Stanley Team?

You and your Morgan Stanley team can identify potential opportunities and risks across your entire portfolio. This may help you have more informed discussions around your financial goals.

External Accounts to Add:

- 401(k) and IRA
- Brokerage Accounts
- Checking Account
- Credit Cards
- House Value
- Mortgage
- Savings Account

With full visibility of your assets and liabilities all in one place, you and your Morgan Stanley Financial Advisor can obtain a comprehensive view of your total wealth¹ to help you track your goals or to start planning for your future using cutting-edge technology. Once your external accounts are added, you can benefit from:



Convenient Access

Available on your desktop, mobile and tablet, this new feature is conveniently integrated into Morgan Stanley Online and the Morgan Stanley Mobile App.



More Informed Wealth Planning

You and your Financial Advisor can now make more informed decisions with respect to your Morgan Stanley accounts by identifying opportunities and risks across your full financial picture.



Safer and More Secure Data Access

Our highest priority is keeping your information protected. Morgan Stanley dedicates significant resources to help protect your assets and personal information. Morgan Stanley does not sell your data to other financial institutions.



Ready to Link Your Accounts?

Log on to Morgan Stanley Online or the Morgan Stanley Mobile App to start adding external accounts.

- If you don't have a Morgan Stanley Online account, simply visit morganstanley.com online to register.
- Click "Add External Accounts" on the homepage to fill in necessary information and view external holdings. For more information, contact your Financial Advisor for the Total Wealth View Client Guide.
- Download the Morgan Stanley Mobile App in the App Store™ for iPhone®/iPad® or Google Play™ for Android™.

Morgan Stanley

1. Total wealth is the sum of total assets minus liabilities disclosed by you to Morgan Stanley.

Total Wealth View (asset aggregation) and Spending & Budgeting (S&B) are tools offered by Morgan Stanley and its unaffiliated service provider, Yodlee Inc. Asset aggregation utilizes technology that retrieves information about external accounts, assets, and liabilities at or available through third party sites as authorized by you. S&B utilizes your Morgan Stanley account information (if applicable) combined with information about your non-Morgan Stanley accounts as retrieved by the Total Wealth View tool to provide calculations relating to your cash flow, expenses, and budgeting. Information provided via both tools are provided solely as a service to you and are in no way intended to be, and should not be construed as, an offer or a solicitation of an offer or a recommendation to buy, sell, or hold any security, financial product, or instrument or to open a particular account or to engage in any specific investment strategy. Additional information about the services described are in the applicable terms of use.

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