

Practical Tips for Managing External Accounts with Total Wealth View

You may experience connectivity or data issues with your aggregated external accounts on Morgan Stanley Online (MSO). While these issues are primarily due to security checkpoints controlled by the host site, the following tips may assist you in troubleshooting.

RE-ESTABLISHING CONNECTION TO EXTERNAL ACCOUNTS

 **Multi-factor Authentication:** Your host site might have a safety feature that requires periodic multi-factor authentication. Click the blue informational icon and follow the steps provided to validate your identity.



 **Updated Credentials:** Your host site username or password credentials may have changed. Click the **red error icon** and follow the steps provided to enter your username and/or new password to MSO

Expired Password:

Your host site has a safety feature that requires a periodic password change. Click the red error icon and follow the steps provided to update your password on the host site, then enter your username and new password to MSO

Account Locked:

You may have experienced unsuccessful attempts to login to your host site, and may be locked out of your account temporarily. Please visit the site or contact its customer support to resolve this issue. Once done, click the red error icon to update your account credentials on MSO if they have changed



Accounts Not Updating or New Institution Request:

If you are unable to resolve your issue using the steps above, or if you are unable to aggregate one of your financial institutions, call (800) 270-9878 (24 hours a day, 7 days a week) and say "Morgan Stanley Online," and then "Total Wealth View" category at the prompt

MANAGING EXTERNAL ACCOUNTS

 **Manage accounts:** If you have added an external account and then later wish to delete that account or mark the account as 'closed', you can do so in Services > Privacy + Settings > Display > Edit External Accounts:

- **Delete Account:** Click "delete"
- **Close Account:** Click "+" next to the account you wish to close, then select "Mark this account closed"