



Funding Your Account

1. Login to your portal by clicking [here](#).
2. Click “Transfer Money”

A screenshot of the ALIGN Investments dashboard. The top navigation bar includes the ALIGN logo and links for Profile and Log Out. A left sidebar menu lists: Overview, Goals, Accounts, Transfer Money (highlighted with an orange arrow), Activity, Risk Tolerance, and Documents. The main content area features three summary cards: Total Portfolio Value, Total Cash Value, and Risk Tolerance. Below these are sections for Goals and Accounts, each with an 'Add' button. A blue button labeled 'I want to...' is located in the top right of the main content area.

3. Click “I want to...” and then “Deposit”

A screenshot of the ALIGN Investments dashboard, showing the 'I want to...' dropdown menu open. The menu lists 'Deposit' and 'Withdraw'. An orange arrow points to the 'I want to...' button, and another orange arrow points to the 'Deposit' option. The main content area shows the 'DEPOSITS' tab selected, with a sub-section for 'Scheduled Deposits' containing the text: 'You have no upcoming deposits scheduled.'



Set Up Your Deposit

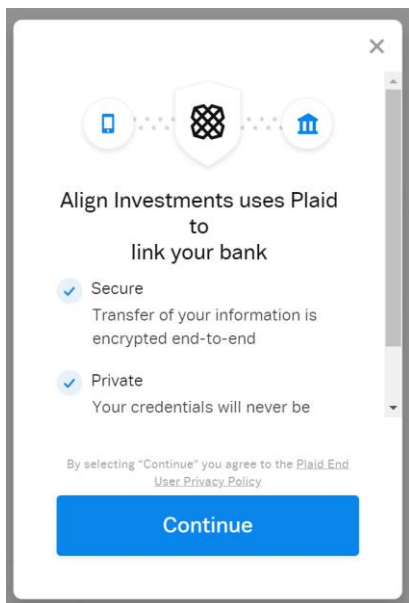
4. Click the “To” dropdown to select which Align account into which you wish to deposit the funds
5. Click the “From” dropdown and select “Add a new bank account”

A screenshot of the ALIGN web portal interface. The top navigation bar includes the ALIGN logo and links for Profile and Log Out. A sidebar on the left contains menu items: Overview, Goals, Accounts, Transfer Money, Activity, Risk Tolerance, and Documents. Below the sidebar, contact information for the advisor is shown. The main content area displays the 'Set Up Your Deposit' form. The form has fields for To, From, Amount, Frequency, and Transfer Date. The 'From' dropdown menu is open, showing 'Add a new bank account' as an option, which is highlighted by an orange arrow. At the bottom of the form are 'Cancel' and 'Continue' buttons.

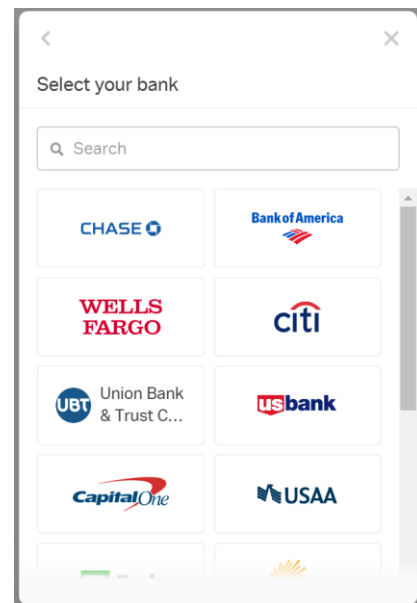


Link Your External Account

6. A new screen will appear – click “Continue”



7. Search for and select your bank (**See below if your bank does not appear.)



8. Enter your outside account’s login credentials (*Note: Not your Align credentials*)
You may be asked to verify your identity (text or phone call)

9. Select the account you wish to link to Align.



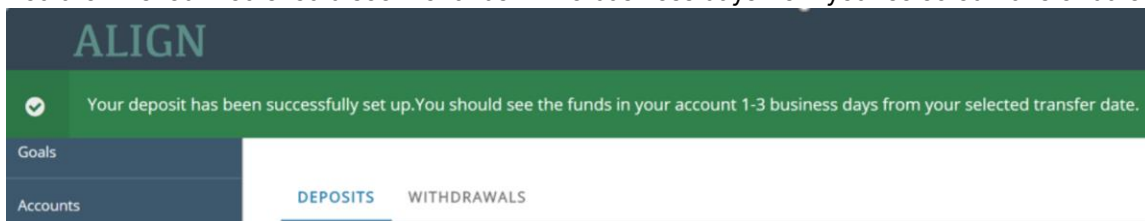
Set Up Your Deposit *(Amount, Frequency, and Date)*

- Align's setup screen will reappear – choose your desired Amount, Frequency and Transfer Date, then click “Continue”

A screenshot of the ALIGN web application interface. On the left is a dark blue sidebar with the ALIGN logo at the top and a navigation menu with items: Overview, Goals, Accounts, Transfer Money, Activity, Risk Tolerance, and Documents. Below the menu is contact information for the advisor. On the right is a white modal window titled "Set Up Your Deposit". The modal contains five input fields: "To" (dropdown), "From" (dropdown), "Amount" (text field with "\$ 0.00" entered), "Frequency" (dropdown), and "Transfer Date" (calendar icon). At the bottom of the modal are two buttons: "Cancel" and "Continue". Four orange arrows point to the "To", "From", "Amount", and "Continue" fields/buttons.



11. Review and confirm the transfer details, then click “Continue”
12. You are finished! You should see the funds in 1-3 business days from your selected transfer date.



***If your bank does not appear, you can click “Link with account numbers” and confirm the link by microdeposits. Follow the step-by-step instructions on your screen.*

