

Having Trouble with Linked Accounts? Check These Things First

87% of errors encountered when linking accounts in AdviceWorks® are caused by user error or an issue at the linked account's financial institution. Some of these tips can help you self diagnose common issues and avoid a call to the AdviceWorks Support team.

How to Avoid User Errors

Most attempts at linking accounts are successful. However, the most common cause of errors during the process is user error: selecting or entering an incorrect financial institution URL, using unknown or incorrect passwords, making typos, answering authentication questions incorrectly, etc.

To help prevent user error:

- Confirm you are selecting the correct URL for your financial institution (some may have multiple websites).
- Confirm you have the correct username and password for your financial institution login. Visit the site if necessary and test your username and password to be sure.
- Take care when typing in your username and password. Select to make your typing visible.
- Be prepared to complete secondary security requirements, like answering all your unique security questions, verifying a token or one-time password via mobile device or identifying images.
- Make sure all your account information at your financial institution is up to date, like email address, phone number, and acceptance of terms and conditions.



What is Multi-Factor Authentication (MFA)?

MFA is used by most major institutions to help ensure digital users are who they say they are by requiring at least two pieces of evidence to prove their identity. Because we take your trust and security very seriously, MFA is included in AdviceWorks to ensure multiple layers of protection so your information stays safe.

[Read more](#) about the AdviceWorks security measures in place to help protect your personal and financial information.

Remember, the AdviceWorks Support team cannot resolve issues that may arise or exist at the financial institution being linked.

Please contact the financial institution directly or use their website to resolve issues like forgotten passwords resets or to get information regarding site outages.