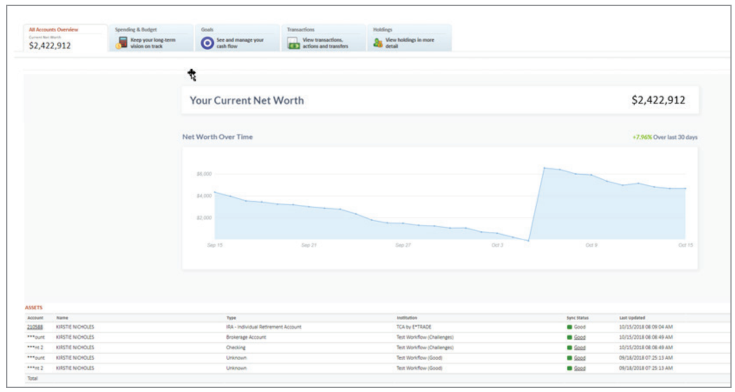
CompleteView troubleshooting

E*TRADE ADVISOR SERVICES

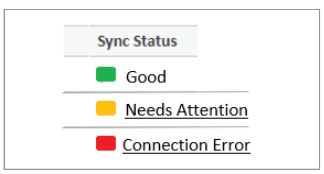
How to address sync status issues after connecting accounts

CompleteView, the account aggregation tool within the Liberty platform, provides a holistic view of your clients' finances and allows your clients to connect outside accounts, such as their savings/checking account, home mortgage, or credit cards. Here are some helpful tips when troubleshooting sync status issues after connecting accounts.



CompleteView screen in Liberty. For illustration only.

"Needs attention" sync status



When troubleshooting this error, ask your client to visit the institution's website, and check to see if their password has expired, if their account is locked out, or if they need to accept new terms and conditions for that specific institution's website.

Challenge question issues

If the account was previously in "Good" status, have your client take a look at their challenge questions. Some financial institutions ask one question at a time, and there may be a an additional security question to answer. Guiding users to check their challenge questions at their bank or credit card website, for instance, may help resolve issues.

"Connection error" sync status

On occasion, financial institutions will perform maintenance to their websites. During this time, account data from that financial institution may not be available. Our system will automatically try to re-sync with the institution. However, if the "connection error" status appears for more than three days, please contact your E*TRADE Advisor Services representative.

When contacting your E*TRADE Advisor Services Representative...

To help expedite issues, please provide the following information:

- Client name and E*TRADE Advisor Services account number
- URL for the financial institution the user is trying to connect
- Account type
- Specifics steps that you and your client went through to verify if this is correct

To learn more about CompleteView, contact your Relationship Manager at 800-955-7808 or email: advisorservices@etrade.com.

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