



Linking an Account on the CUIS Client Portal

DESKTOP & MOBILE GUIDE



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Linking an Account on the CUIS Client Portal

DESKTOP VERSION

STEP 1

Log in to your CUIS Client Portal at <https://client.envestnet.com/CUIS>

If you don't have CUIS Client Portal access, please contact your CUIS Investment Representative or call the Investment Services Call Center at (800) 451-5467 to request a registration invitation email.

STEP 2

Click on “Accounts” in the Dashboard on the left side of the screen:



-  Home
-  Net Worth
-  Reports
-  **Accounts**
-  Spending
-  Documents

STEP 3

Click on “Link an account” to begin the process of entering your login credentials for your SECU accounts or other financial institutions!

Note: The “Manually add an account” option is typically reserved for adding assets, such as a real estate property or vehicle. The value of any manual assets will factor into your Net Worth calculations.

Any values entered manually are static and will not increase or decrease automatically.

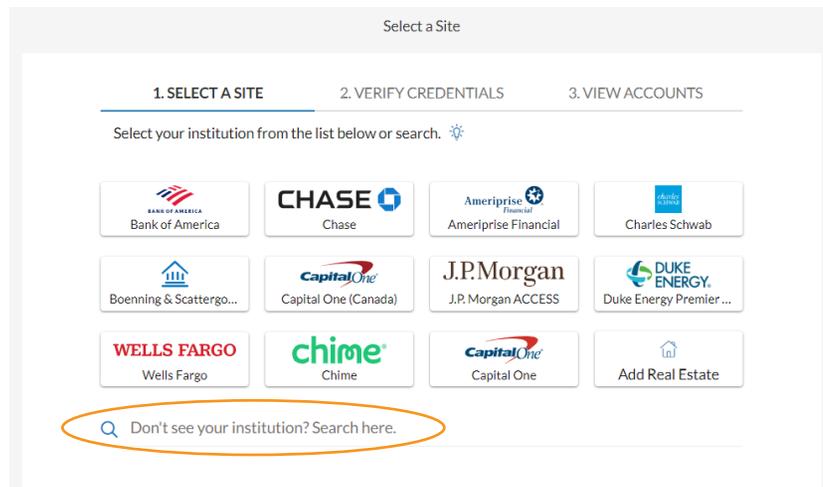
Add Your Accounts!

 **Link an account**

 **Manually add an account**

STEP 4

Common financial institutions pre-populate. If you don't see your financial institution listed, enter the information in the "Search here" area by clicking on the magnifying glass icon.

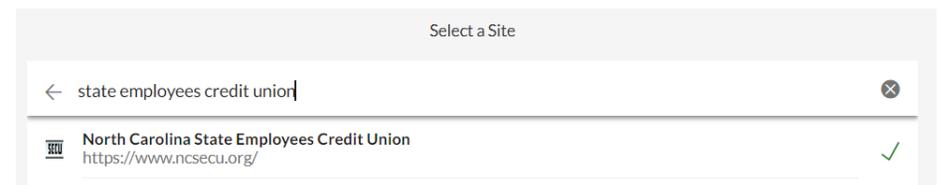


STEP 5

Type in your financial institution's name. In this example, "State Employees' Credit Union" is entered.

You may see other options appear when you type in the name of your financial institution.

Select the correct financial institution, which you can verify by the institution name and URL (website) that populates.



STEP 6

Enter your User ID and Password for the financial institution you selected.

After entering your login credentials for the selected financial institution, be sure to select the checkbox in which you agree to the Fastlink Terms of Service to proceed.

Log In

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

State Employees' Credit Union

North Carolina State Employees Credit Union
www.ncsecu.org

Please enter your North Carolina State Employees Credit Union login credentials. 🔒

User ID

Password

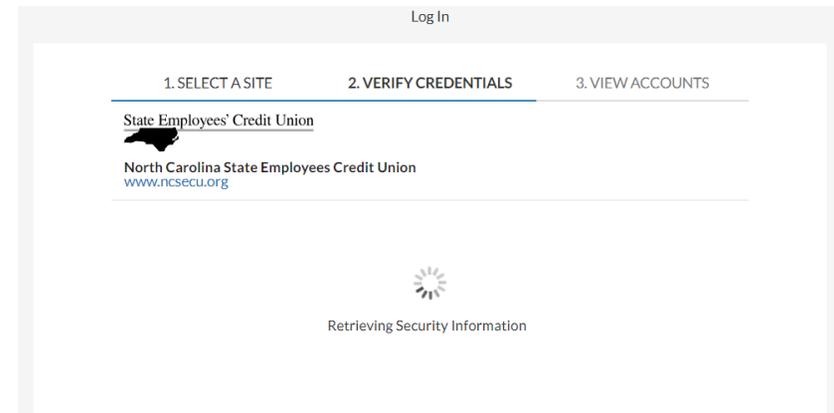
Re-enter Password

By clicking CONTINUE, you agree to the [Fastlink Terms of Service](#) for account linking.

< Back Continue

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection with your financial institution.

While linking to the financial institution, the following page will appear:



LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

Once the accounts have successfully linked, you can review and edit any that you may not want to include – perhaps a joint account with a child, for instance.

Linked Accounts	
1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS	
State Employees' Credit Union	
North Carolina State Employees Credit Union www.ncsecu.org	
View all your accounts below. To remove an account, tap on the gear icon and delete it.	
Cash	
Zard Share Savings	USD 3,878.02
Zard Checking Checking	USD 13.08
Share Savings	USD 2,427.12
Money Market Money Market	USD 2,871.74
Fat Cat Share Savings	USD 669.66

After reviewing the accounts you want to link, click on the blue “Close” button.

Fat Cat Share Savings	USD 1,018.85
Checking Checking	USD 4,189.64
Cards	
Visa Credit Card Credit Card	USD 0.00
Loans	
Vehicle Loan Personal Loan	USD 14,315.69
Vehicle Loan Personal Loan	USD 6,822.82
Home Equity Line of Credit Personal Loan	USD 15,000.00

LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

If the linking process is successful, you will see the following message. Click “Go to accounts” to return to the Client Portal.



You're good to go!

[Go to accounts](#)

After linking your account, you will see the following note at the top of your screen on the Client Portal Page:

Please note that the linked accounts may take several minutes to populate on your Accounts page.



Success!



The portal now reflects your recently linked account data.

If you wish to add additional accounts, you can click on the “Add account” dropdown button on the right-hand side of the “Accounts” page and follow the same linking process described above by clicking “Link an account.”

[Add account](#) ▾

[Link an account](#)

[Manually add an account](#)

LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

Please note that the linking process can vary slightly depending on the financial institution selected. For instance, some financial institutions may require that you grant authorization to release data.

In these scenarios, a new webpage for that institution will pop up, and you will need to enter your financial institution login credentials and agree to terms on that new page.

Some financial institutions may provide additional disclosures about timing of account syncing.

< Log In

1. SELECT A SITE 2. VERIFY CREDENTIALS 3. VIEW ACCOUNTS

CHASE
Chase
www.chase.com

Before we can finish setting up your new connection, you'll need to tell Chase to release your data to us. Click Continue to follow the Chase process for granting that permission.

Accounts
[What does this include?](#)

Transactions
[What does this include?](#)

By clicking CONTINUE, you agree to the [Fastlink Terms of Service](#) for account linking.

< Back Continue

KNOWN EXCEPTIONS

1. NC 529 plans through the College Foundation of North Carolina (CFNC) do not link to the Client Portal at this time. For the budgeting tool, transactions such as contributions to the NC 529 plan are not currently importing.
2. Health Savings Accounts (HSA) and Flexible Spending Accounts (FSA, Dependent Care FSA) from MetLife do not link to the Client Portal at this time.
3. After linking SECU accounts, there may be a discrepancy with transactions shown for paying SECU loans from those accounts, i.e. funds transfers to pay the loans from an SECU account. This could affect spending reports and budgeting.

The new Client Portal is provided by Envestnet and does not offer trading or self-servicing capabilities. CUIS encourages you to reach out to your dedicated investment representative for assistance with any servicing needs. Investment advisory services offered through Credit Union Investment Services. Securities offered through SECU Brokerage Services. Member FINRA, SIPC. Securities products are not credit union deposits, are not obligations of or guaranteed by the Credit Union or its affiliates and are not insured by the NCUA or any federal government agency. Securities products involve investment risks, including possible loss of principal invested. Investment representatives are also credit union employees, who may accept deposits.

Credit Union Investment Services (CUIS) is a wholly-owned subsidiary of State Employees' Credit Union (SECU) and is an investment advisor registered with the State of North Carolina.



Linking an Account on the CUIS Client Portal

MOBILE VERSION

LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

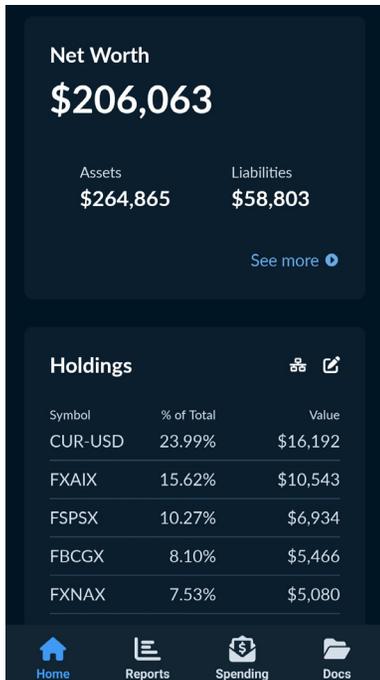
STEP 1

Log in to your Investnet Client View app on your mobile phone.

If you don't have CUIS Client Portal access, please contact your CUIS Investment Representative or call the Investment Services Call Center at (800) 451-5467 to request a registration invitation email.

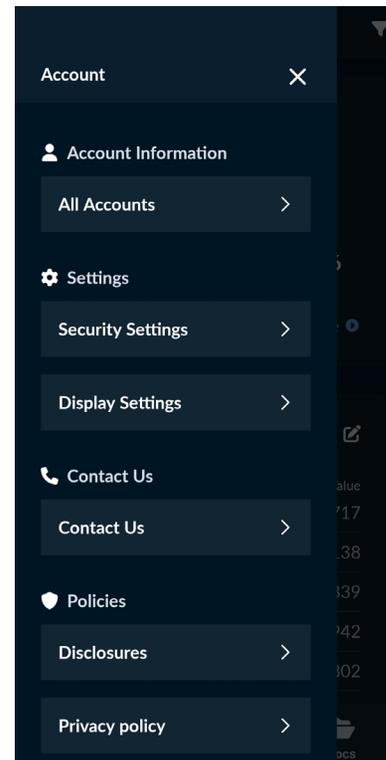
STEP 2

Select the menu icon in the upper left corner.



STEP 3

Select all accounts.

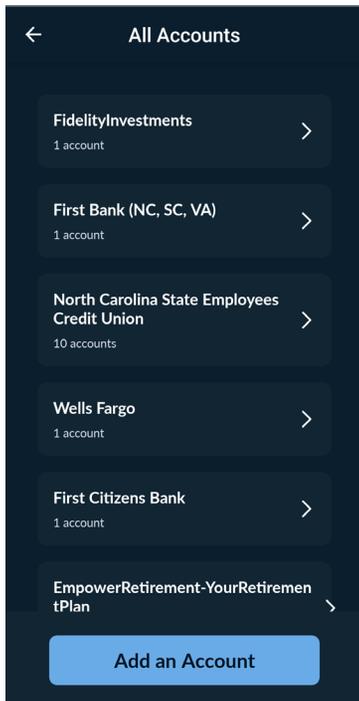


STEP 4

Select “Add an Account” to begin the process of entering your login credentials for your SECU accounts or other financial institutions.

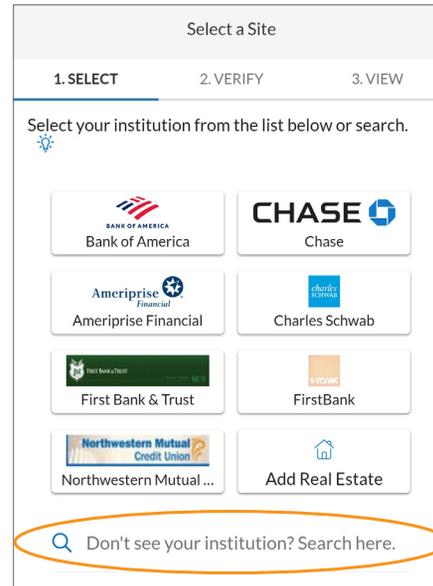
Note: The “Manually add an account” option is typically reserved for adding assets, such as a real estate property or vehicle. The value of any manual assets will factor into your Net Worth calculations.

Any values entered manually are static and will not increase or decrease automatically.



STEP 5

Common financial institutions pre-populate. If you don't see your financial institution listed, enter the information in the “Search here” area by tapping on the magnifying glass icon.

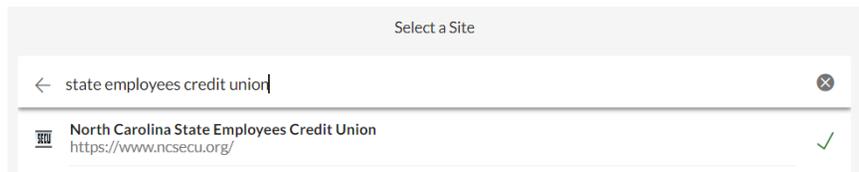


STEP 6

Type in your financial institution's name. In this example, "State Employees' Credit Union" is entered.

You may see other options appear when you type in the name of your financial institution.

Select the correct financial institution, which you can verify by the institution name and URL (website) that populates.

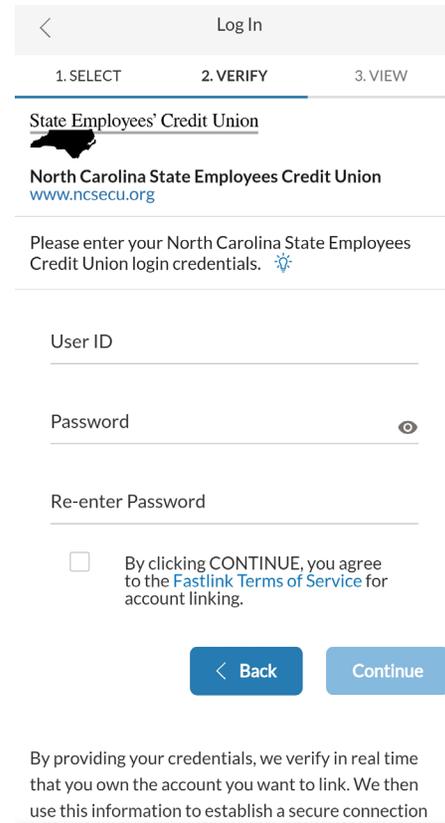


The screenshot shows a search bar with the text "state employees credit union" entered. Below the search bar, a list of search results is displayed. The first result is "North Carolina State Employees Credit Union" with the URL "https://www.ncsecu.org/". A green checkmark is visible to the right of this result, indicating it is the selected option.

STEP 7

Enter your User ID and Password for the financial institution you selected.

After entering your login credentials for the selected financial institution, be sure to select the checkbox in which you agree to the Fastlink Terms of Service to proceed.



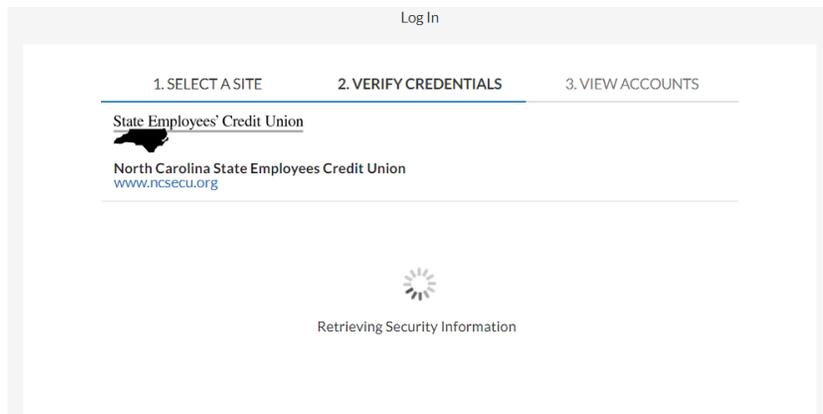
The screenshot shows the login screen for the State Employees' Credit Union. The screen is titled "Log In" and has three steps: 1. SELECT, 2. VERIFY, and 3. VIEW. The first step is completed, and the second step is active. The screen displays the institution's name, "State Employees' Credit Union", and the URL "www.ncsecu.org". Below this, there is a message: "Please enter your North Carolina State Employees Credit Union login credentials." followed by a lightbulb icon. There are three input fields: "User ID", "Password", and "Re-enter Password". Below the input fields, there is a checkbox and a message: "By clicking CONTINUE, you agree to the Fastlink Terms of Service for account linking." At the bottom, there are two buttons: "Back" and "Continue".

By providing your credentials, we verify in real time that you own the account you want to link. We then use this information to establish a secure connection

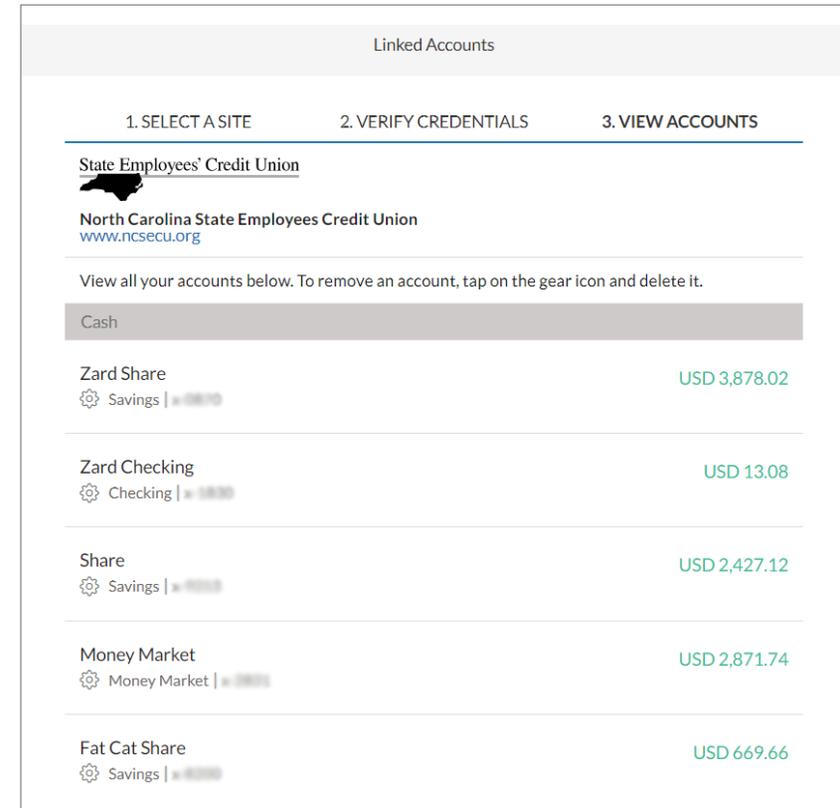


LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

While linking to the financial institution, the following page will appear:



Once the accounts have successfully linked, you can review and edit any that you may not want to include — perhaps a joint account with a child, for instance.



LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

After reviewing the accounts you want to link, touch the blue “Close” button.

Fat Cat Share	USD 1,018.85
Savings 0044	
<hr/>	
Checking	USD 4,189.64
Checking 0042	
<hr/>	
Cards	
Visa Credit Card	USD 0.00
Credit Card 0017	
<hr/>	
Loans	
Vehicle Loan	USD 14,315.69
Personal Loan 0009	
<hr/>	
Vehicle Loan	USD 6,822.82
Personal Loan 0005	
<hr/>	
Home Equity Line of Credit	USD 15,000.00
Personal Loan 0007	
<hr/>	
Close	

If the linking process is successful, you will see the following message. Click “Go to accounts” to return to the Client Portal.



You're good to go!

[Go to accounts](#)

After linking your account, you will see the following note:

Please note that the linked accounts may take several minutes to populate.



Success!

The portal now reflects your recently linked account data.

LINKING AN ACCOUNT TO CUIS CLIENT PORTAL

Please note that the linking process can vary slightly depending on the financial institution selected. For instance, some financial institutions may require that you grant authorization to release data.

In these scenarios, a message for that institution will pop up, and you will need to enter your financial institution login credentials and agree to terms.

Some financial institutions may provide additional disclosures about timing of account syncing.

The screenshot shows a mobile application interface for linking a Chase account. At the top, there is a navigation bar with a back arrow and the text "Log In". Below this is a progress indicator with three steps: "1. SELECT A SITE", "2. VERIFY CREDENTIALS" (which is currently active), and "3. VIEW ACCOUNTS". The main content area features the Chase logo and the text "Chase www.chase.com". Below the logo, there is a message: "Before we can finish setting up your new connection, you'll need to tell Chase to release your data to us. Click Continue to follow the Chase process for granting that permission." There are two sections: "Accounts" with a link "What does this include?" and "Transactions" with a link "What does this include?". At the bottom, there is a checkbox that is checked, with the text "By clicking CONTINUE, you agree to the Fastlink Terms of Service for account linking." Below the checkbox are two buttons: "Back" and "Continue".

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