

How to Add and View Net Worth in Insights

Digital Banking's Net Worth feature makes it easier than ever to track your investments, value, and overall financial well-being. Net Worth is a financial metric that calculates the difference between your assets (owned) and liabilities (owed).

01 Navigate to Net Worth

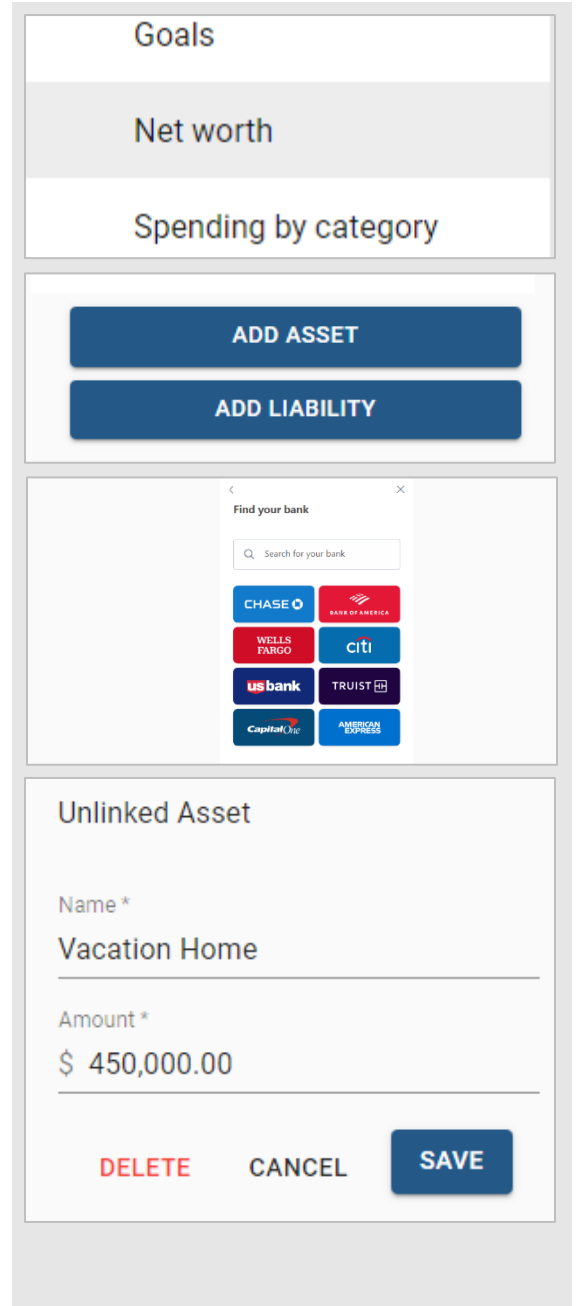
- On the main dashboard, you will have two options to access **Net Worth**
 - From the left navigation menu, click the **Insights** dropdown and select **Net Worth**, or
 - From your main dashboard, select the account you want to work with and click the **Insights** tile. From the Insights dashboard top menu, click **Net Worth**

02 Manage Net Worth

- On the Net Worth dashboard, click **Add Asset** or **Add Liability**
- On the Total Assets page, you will be able to **Linked Asset/Liability** or **unlinked Asset/Liability**
 - Click **Linked Asset/Liability** – MainStreet Bank uses Fincity, a Mastercard company who will securely access, process and share requested financial data with your app in service.
 - Click **Unlinked Asset/Liability** – Enter Name and Amount if you do not want to link the External Account but want to include it in the Total Assets. Then click **Save**

03 Manage Assets and Liability

- On the Total Assets page, you will be able to alter an existing Asset or Liability
- On the right-hand side, the selected Asset/Liability will show, and you will have 3 options:
 - **Delete** – This will remove the Asset/Liability from your Net Worth
 - **Cancel** – This will close the page of the chosen Asset/Liability
 - **Save** – This will save any changes you have done



The screenshot shows the Net Worth management interface. At the top, there are three menu items: "Goals", "Net worth", and "Spending by category". Below these are two large blue buttons: "ADD ASSET" and "ADD LIABILITY". The next section is a "Find your bank" modal with a search bar and a grid of bank logos including Chase, Bank of America, Wells Fargo, Citi, US Bank, Truist, Capital One, and American Express. Below the modal is the "Unlinked Asset" form, which has a "Name *" field containing "Vacation Home" and an "Amount *" field containing "\$ 450,000.00". At the bottom of the form are three buttons: "DELETE", "CANCEL", and "SAVE".