



TODAY

Madison's **Accounts**

Joint Accounts are visible to ONLY the primary owner (unless accounts are linked)

John's **Accounts**





John is joint owner



Credit Card John is joint owner

Madison only sees these 3 accounts



Auto Loan Madison is joint owner



Savings



Certificate

John only sees these 3 accounts

AFTER UPGRADE

Madison's **Accounts**

Joint Accounts are visible to BOTH owners (will now see balances and activity for joint accounts)

John's **Accounts**





Checking John is joint owner



Credit Card John is joint owner



Auto Loan Madison is joint owner



Savings



Certificate

Madison now sees all 4 accounts

John now sees all 5 accounts