Consolidate accounts and cash flow with Fidelity Full View

> *“Our finances and card accounts are scattered across multiple institutions and spreadsheets with no unified spending view.”*

Category: operations **Setup Time:** ~15 minutes **Estimated Hours Saved:** 2 hrs/week **Direct Software Cost:** $0 / month

SOLUTION SUMMARY

Activate Full View within your Fidelity dashboard to aggregate external checking, credit card, and loan balances into an ad-free cash-flow control center. Configure custom categorization rules so recurring overhead and personal distributions separate automatically without manual spreadsheet entry. Reviewing consolidated monthly spending reports backed by enterprise brokerage security uncovers cash drag without third-party ad clutter.

REQUIRED TOOLS & DIRECT WHOLESALE UTILITIES

- **Fidelity Full View:** **(Free Tier / Wholesale)**

STEP-BY-STEP APPLICATION INSTRUCTIONS

1. **Log into Fidelity and open Full View**
   Navigate to Planning & Advice in your Fidelity portal and select Full View to access the aggregation workspace.

2. **Connect non-Fidelity financial accounts**
   Click Add Non-Fidelity Accounts to link your outside business checking, credit card, and mortgage accounts via Akoya and eMoney data integrations.

3. **Define custom categorization rules**
   Review recent imported transactions and assign automated category rules for business expenses, software, travel, and payroll distributions.

4. **Generate monthly cash-flow and net-worth reports**
   Review the Spending & Cash Flow reports each month to track overhead trends and verify balances across all external institutions in one clean view.

5-POINT QUALITY VERIFICATION PROTOCOL

[ ] **Carrier & Webhook Test:** Confirm webhook listener receives test payload and returns HTTP 200 within 500ms.

[ ] **End-to-End Simulation:** Execute live test event from personal device and verify SMS/email delivery.

[ ] **Anti-Spam & Rate Limit Check:** Verify repeated submissions do not trigger duplicate messages to clients.

[ ] **Direct Ownership Audit:** Confirm all API keys, accounts, and credentials belong directly to your practice.

[ ] **Staff Notification Verification:** Verify practice manager/receptionist receives real-time push alert with dial link.

FREQUENTLY ASKED QUESTIONS

Q: Is Fidelity Full View free?

A: Yes. Fidelity Full View is provided at no charge to anyone with a Fidelity brokerage, cash management, or retirement account. There are no subscription fees or third-party advertisements.

Q: How does Fidelity Full View connect to outside banks?

A: Fidelity Full View uses eMoney and Akoya data networks to establish secure, read-only connections with external institutions. Login credentials are protected by enterprise financial security protocols.

Source: dgfcorporations.com/fixes/consolidated-spending-hub-fidelity-full-view/ · Free to use, modify & deploy

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