

TO SET A GOAL

1. Click on the GOALS Tab
2. Select ADD GOAL button on the bottom right of the screen

Budget Manager

Home | BUDGETS | CASHFLOW | **GOALS** | NET WORTH

Spending by Category

1 WEEK | **1 MONTH** | 3 MONTHS | 6 MONTHS

Savings
\$3,200

Budgets Progress

Monitor and track your spending
Setting budgets helps keep your spending and saving on track

ADD BUDGET

Cashflow

3 Months of Income

| Month | Income |
|-------|---------|
| Jul | \$1,125 |
| Aug | \$3,059 |
| Sep | \$3,304 |

Up 8% last 30 days

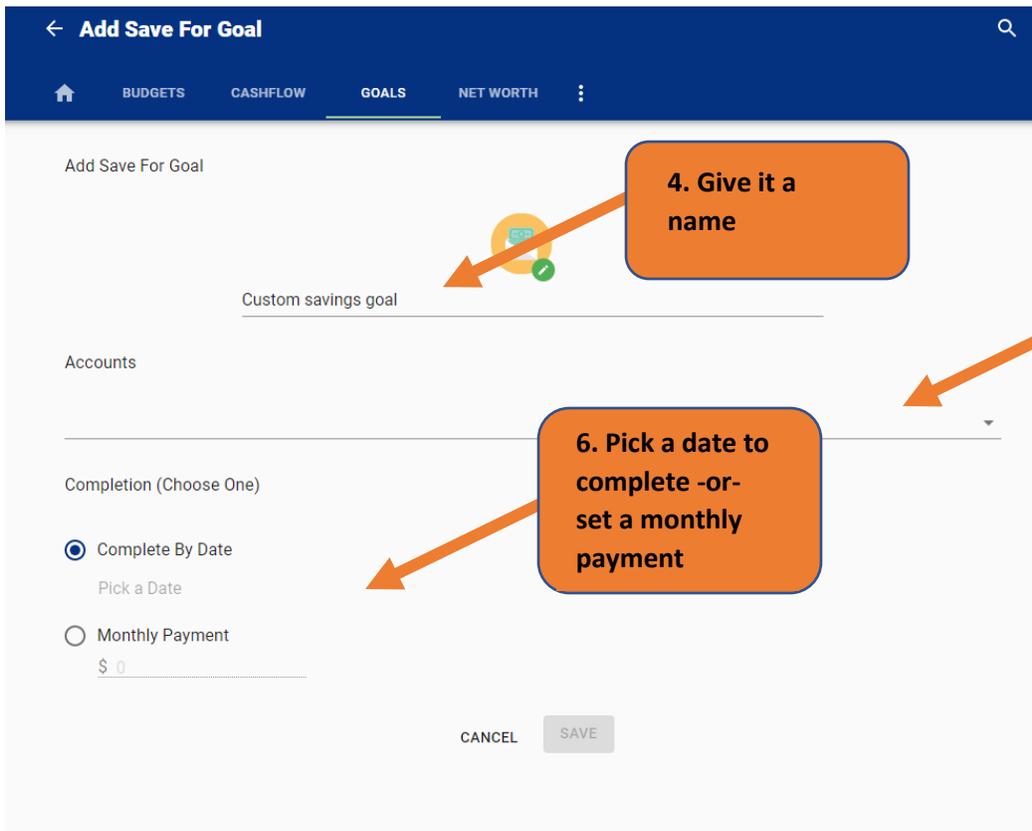
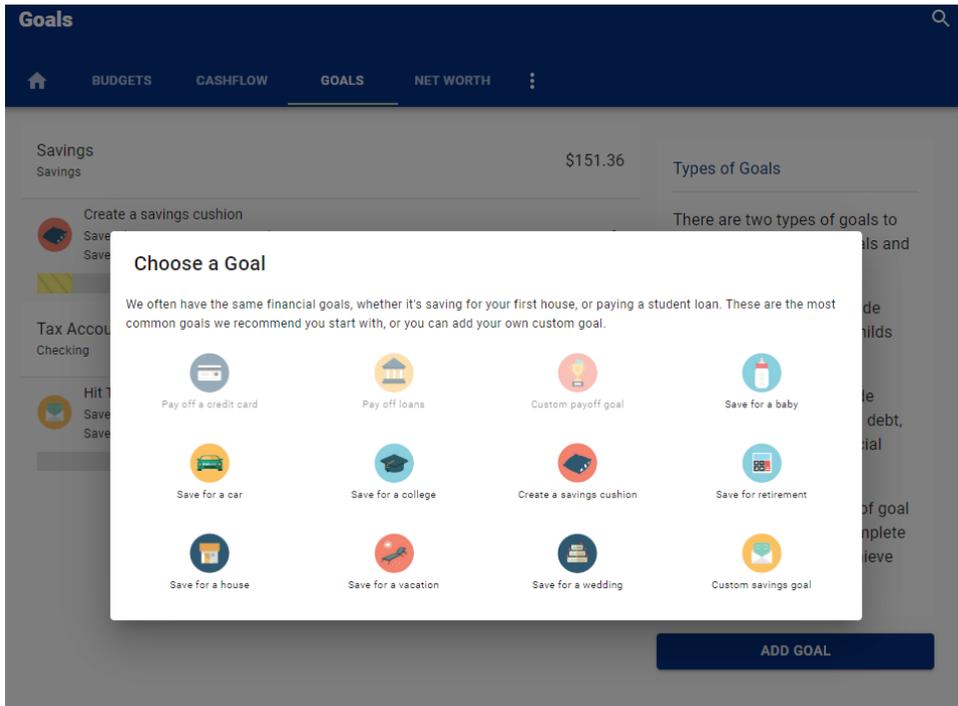
Net Worth

October 2019

Total Net Worth
\$1,534.80

No history available yet

3. Choose a fun little icon to represent your Savings Goal



PLEASE NOTE:

This step does not MOVE money to your account, you will have to set that up in Online Banking. Money Manager is used to show you how to get your goals and also to track what you've set.

← **Add Save For Goal**

[🏠](#)
[BUDGETS](#)
[CASHFLOW](#)
[GOALS](#)
[NET WORTH](#)
⋮

Add Save For Goal



Kitchen Cabinets

Accounts

Savings

Amount you want to save *

\$ 2,000.00

This account has **\$151.36**. Start tracking \$ 151.36 towards my goal

Completion (Choose One)

Complete By Date
 Aug 1, 2020

Monthly Payment
 \$ 0

Goal Summary

Because I set a completion date, the goal summary tells me how much I need to save each month to hit my goal in time.

You're saving **\$1,848.64** by 8/1/2020 for Kitchen Cabinets goal. If you save **\$308.11** a month, you will be able to complete your goal in time.

Once you've saved your goal, your GOALS screen will show you where you are on any Saving or Pay Off goal you've set. You can update or change these at any time by clicking on their name.

Goals

BUDGETS CASHFLOW **GOALS** NET WORTH

Savings \$151.36

Create a savings cushion
Saved **\$64.52** towards goal of **\$2,500.00**
Save **\$260.00** monthly to complete on 11/21/2020

Kitchen Cabinets
Saved **\$86.28** towards goal of **\$2,000.00**
Save **\$310.00** monthly to complete on 8/1/2020

Tax Account \$250.00

Checking

Hit Tax Savings Goal
Saved **\$0.00** towards goal of **\$3,000.00**
Save **\$210.00** monthly to complete on 11/21/2020

Types of Goals

There are two types of goals to choose from: Save for Goals and Pay Off Goals.

Save for Goals could include saving for your next car, child's college fund, etc.

Pay Off Goals could include paying off your credit card debt, short and long term financial goals.

Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals

ADD GOAL

Every time you login to Online Banking and select the Money Manager Tab, it will update your Goals with your current account totals.
