



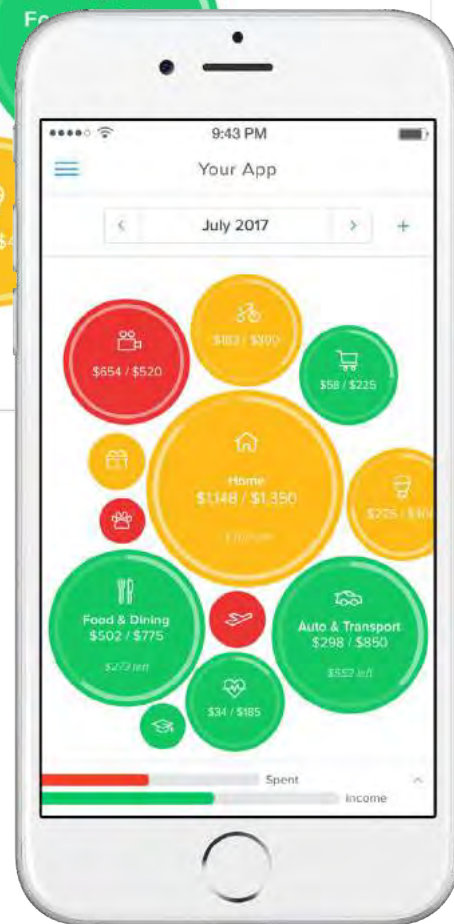
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# Money Management User Guide









## Budgets

A visualization of your data on a monthly basis. You can create custom budget categories, change the amount of money allocated to the monthly budget, view historical monthly budgets, and change the projected income amount. Budgets can be viewed as bubbles or traditional bars.



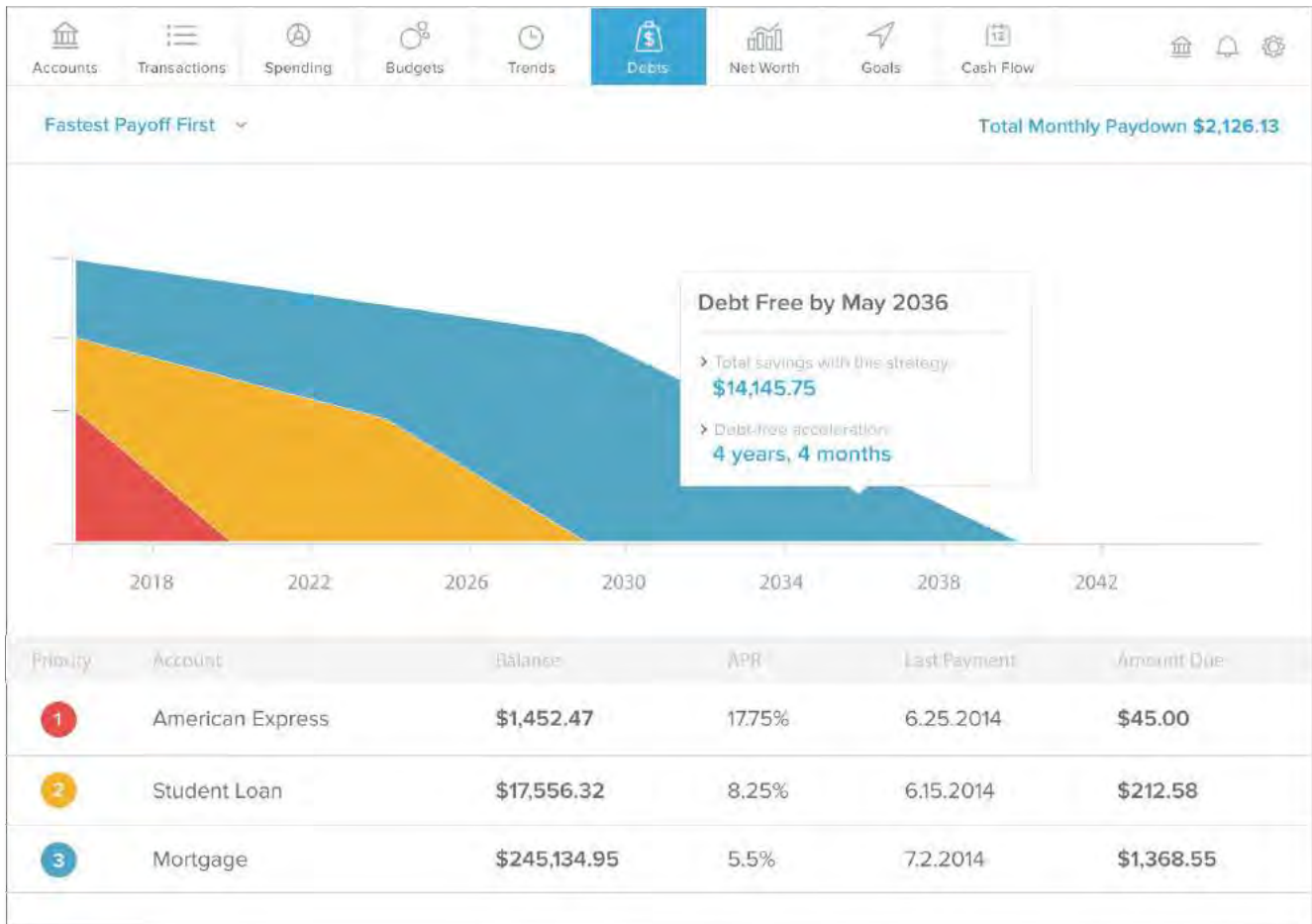
## Trends

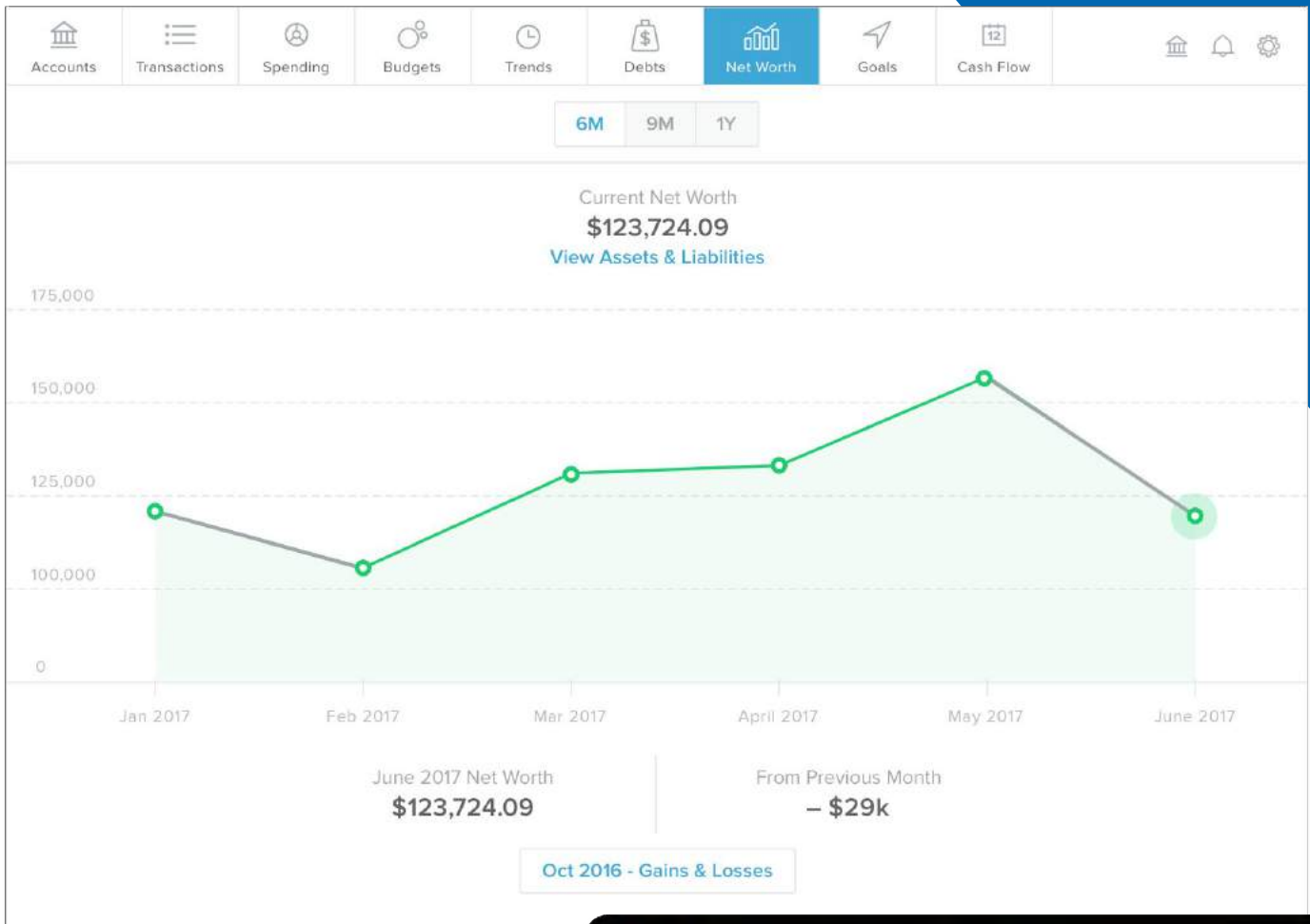
A visualization of spending over time divided into categories. You can drill into subcategory views and see transaction details. You can also track income and define the date range over 3, 6, 9 or 12 months.



# Debts

A tool that allows you to manage a debt plan from your aggregated liability accounts. You can view balances, APR, last payment date and minimum payment. You can also project debt payoff dates and prioritize the payoff of certain debts.





## Net Worth

A visualization of your net worth over time. You can drill into each month and see how certain transactions affect overall net worth. You can also define the date range over 3, 6, 9 or 12 months.

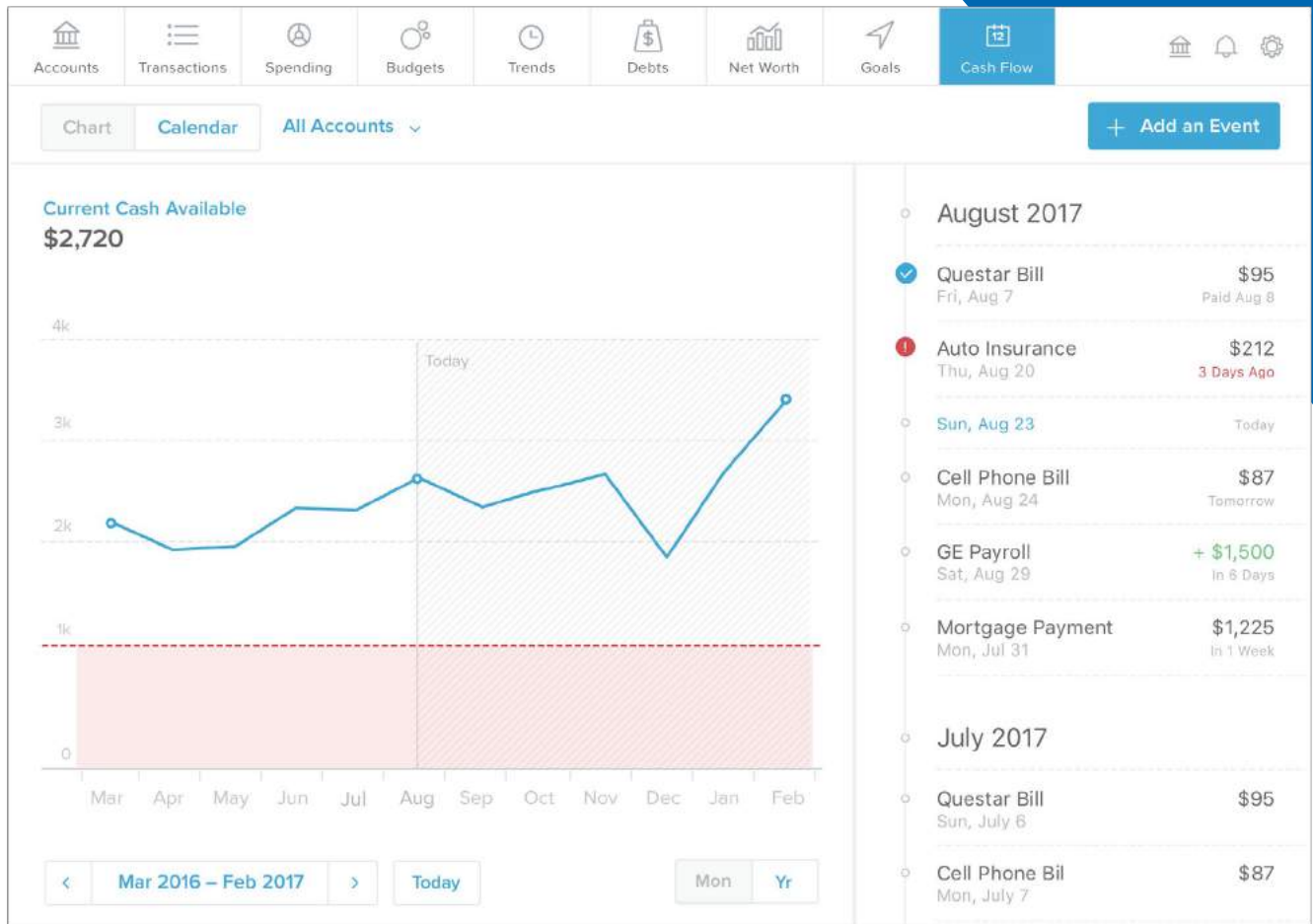




# Goals

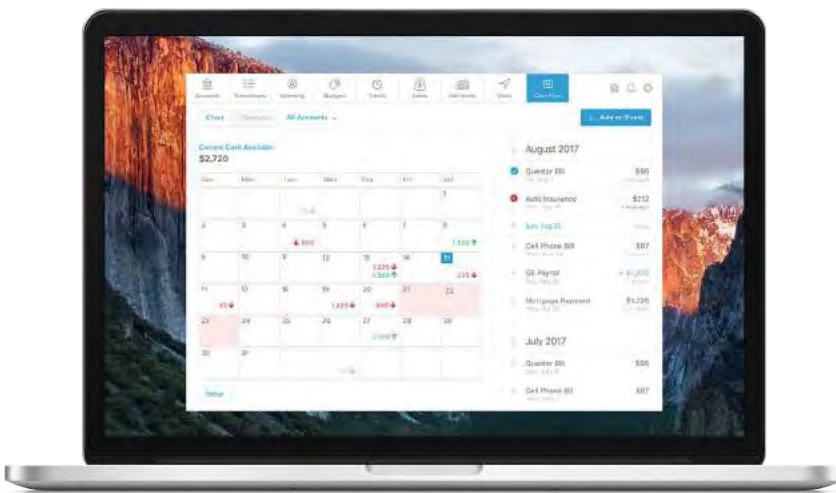
A tool that allows you to manage and visualize their goals on a timeline. You can create a goal, name it, and associate it with an internal or external account. You can also change the amount and priority of each goal, as well as the total amount available overall.

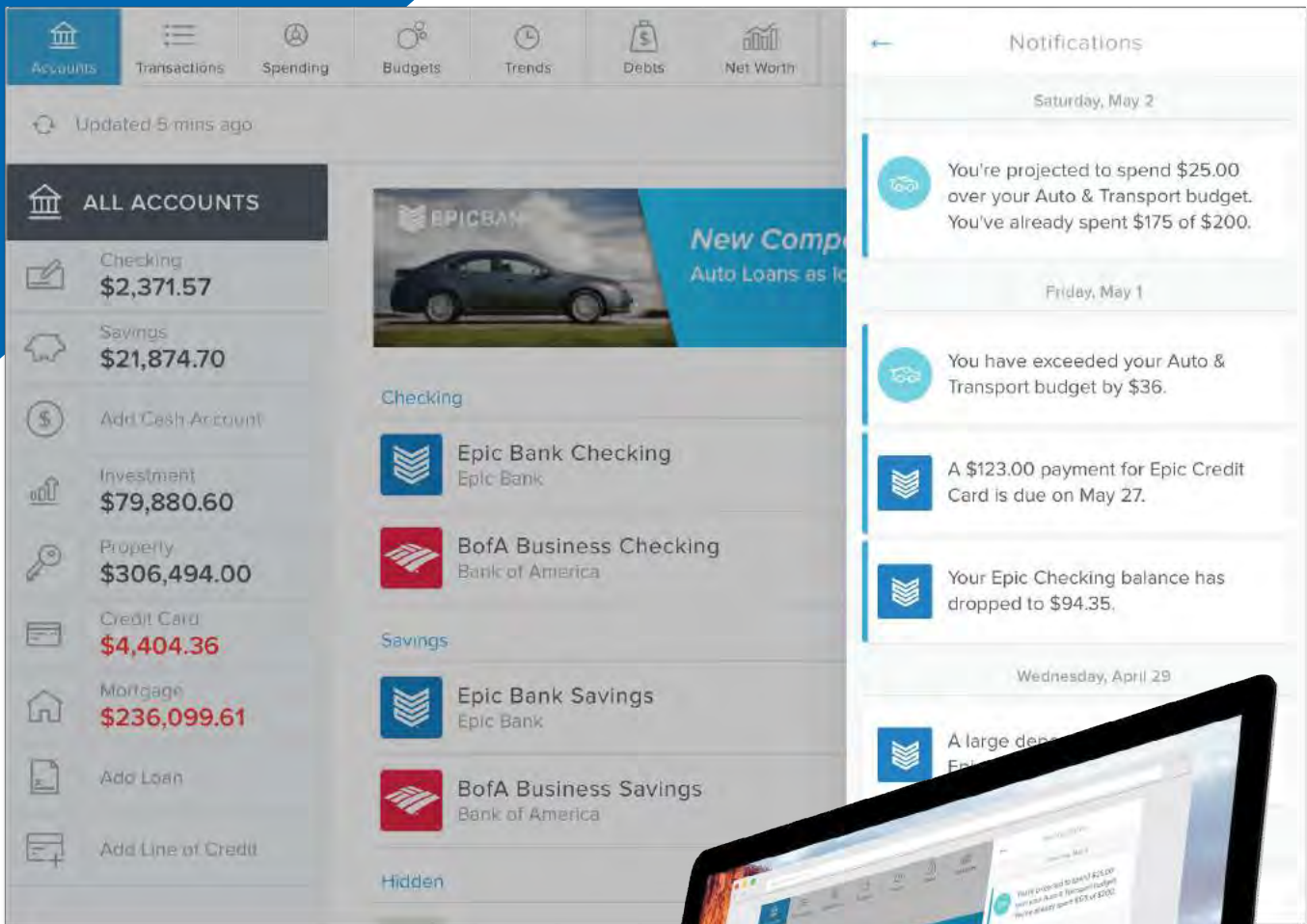




## Cash Flow

A feature that identifies recurring deposits and payments to show spending trends in a clear, simplified view. You can see the impact of additional recurring payments and take action by planning for future expenses.





## Alerts

A notification system that can send SMS and/or email messages to you, based on your preferences. Alerts include: Exceeded Budgets, Debt Payment Reminder, Low Account Balance, Large Deposit, Large Expense/Withdrawal and Fee Charged. You can define alert thresholds on a per-account and a per-alert basis.

