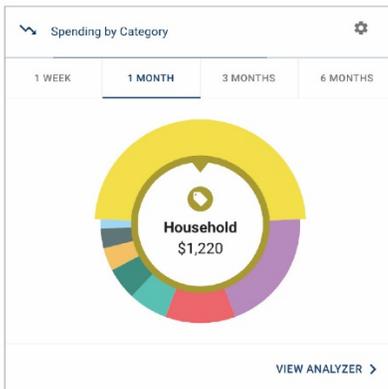


Quick Start Guide

Welcome to **Money Manager** with updated features & functionality!



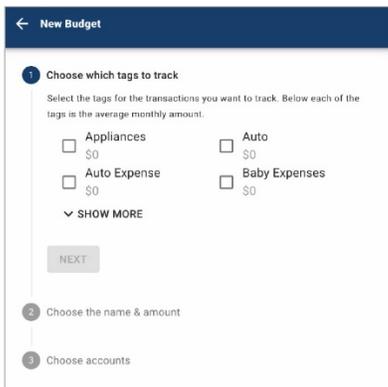
Dashboard

See which spending category you have spent the most in so far this month.

Step 1: Select other parts of the wheel to see other major category spending. Your transactions will categorize themselves with 'tags'.

Step 2: To personalize these categories, or split the transaction between tags, select the transaction and edit the tag.

Step 3: When you select a transaction from the dashboard you can also change the name of the transaction, create a budget or add a recurring transaction to your Cashflow Calendar.



The screenshot shows the 'New Budget' setup screen. Step 1 is 'Choose which tags to track'. Below this, it says 'Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.' There are four checkboxes with labels and amounts: 'Appliances \$0', 'Auto \$0', 'Auto Expense \$0', and 'Baby Expenses \$0'. A 'SHOW MORE' link is visible below the checkboxes. A 'NEXT' button is at the bottom of the step. Below the step list, there are two more steps: '2 Choose the name & amount' and '3 Choose accounts'.

Spending Targets

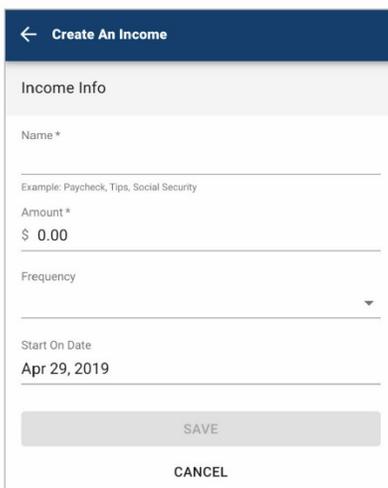
New users can look at the insights for guidance on what to budget based on spending.

Step 1: Navigate to Budgets and click on "View Budgets."

Step 2: Click on the Spending Target you'd like to edit from the list.

Step 3: Click "Edit Budget" to edit or delete.

Step 4: You can change the name, amount, tags, and accounts associated with this Spending Target from here.



The screenshot shows the 'Create An Income' form. It has a title bar with a back arrow and 'Create An Income'. Below is the 'Income Info' section with the following fields: 'Name *' (with an example: 'Paycheck, Tips, Social Security'), 'Amount *' (set to '\$ 0.00'), 'Frequency' (with a dropdown arrow), and 'Start On Date' (set to 'Apr 29, 2019'). At the bottom are 'SAVE' and 'CANCEL' buttons.

Cashflow

The cash flow calendar brings your budget to life through an interactive calendar.

Step 1: Navigate to Cashflow.

Step 2: Click the plus sign to "Add Income" or "Add Bill."

Step 3: Enter in the required information and select "Save."

Goals

Create savings goals, like saving for a vacation, or a debt reduction goal, like paying off a high-rate credit card.

Step 1: Navigate to Goals, and select “Add Goal.”

Step 2: Select your desired pay off or savings goal. **Step 3:** Fill in the required information.

Step 4: Click “Save” to complete the process of adding a new goal.

Keep in mind, your Goal Summary will update your completion date and the amount needed per month according to your preferences. Goals will automatically update your progress and will reflect your day-to-day account balances in Money Manager.

Add an Account

Syncing other accounts for a complete financial picture is simple.

Step 1: Navigate to Accounts, and click the plus sign to “Add Linked Account.”

Step 2: Select an institution or use the search to find your institution.

Step 3: Enter in the required information and select “Connect.”

You’ll receive a notification on your Money Manager dashboard once the account has been synced successfully.

Money Manager Mobile

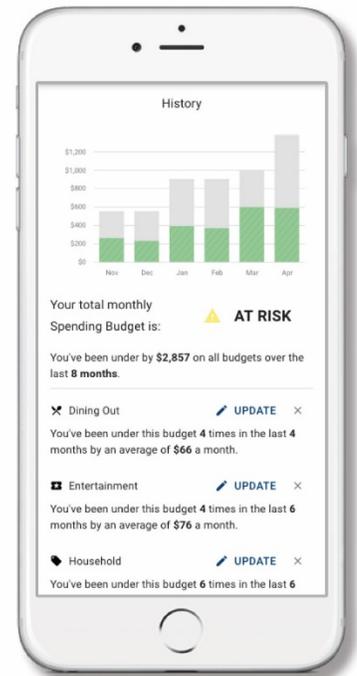


Interactive Spending Wheel

View your top expenses in real-time. Click the center to **see a list of transactions from each category**, to stay in touch with your spending and overall finances.

Easy Budget Tools

Build and view spending targets that are important to your financial big picture. The new **insights feature provides your spending history**, along with suggestions for staying on track.

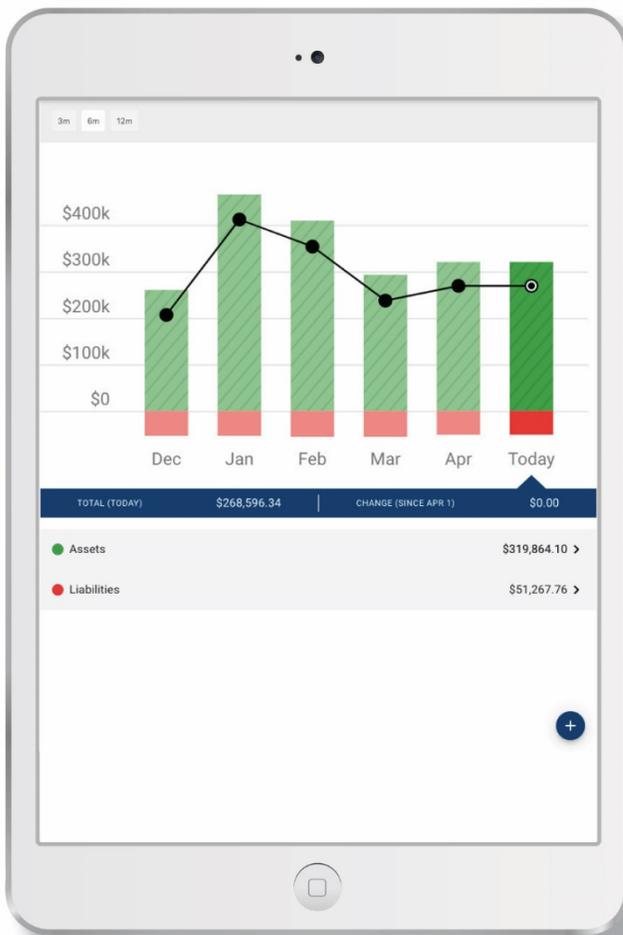
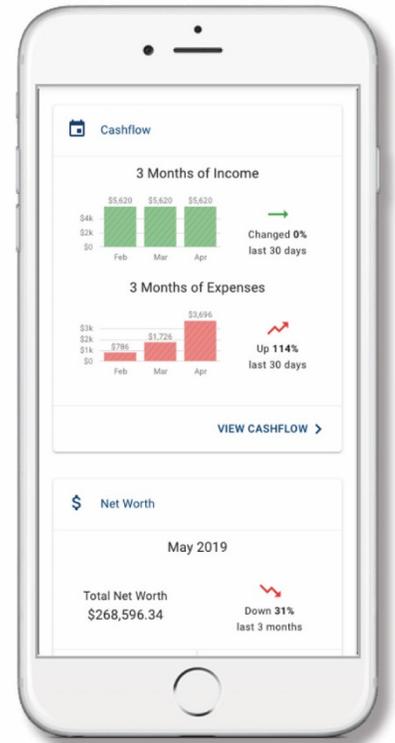


Spending At a Glance

The analyzer **quickly shows your percentage and total amount spent in each category**; while allowing the user to customize the date range to identify any trends.

Cash Flow Control

By adding your paychecks and expenses, you're now able to **view income and spending trends** right from the dashboard. The better you understand your cash flow, the easier it is to manage it on a daily, weekly and monthly basis.



Net Worth Snapshot

Track your investments, wealth and debts all in one place; while having **access to monthly, quarterly, and annual trends**. Your financial future is just as important as your day-to-day.