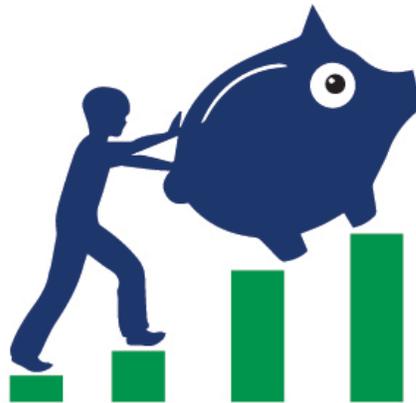


We have a cool new tool inside ONLINE BANKING for everyone to use called **MONEY MANAGER!**

MONEY MANAGER has a host of features but we're going to start slow with Setting a Savings Goal.



Set a Savings  
**GOAL**  
& Track It!  
**Money  
Manager**  
a free online tool

When you login to ONLINE BANKING, you'll see a TAB on the Blue Menu Bar called MONEY MANAGER. Click on it and it opens in another browser tab that is separate from your Online Banking interface. Money Manager pulls information from your accounts but it does not MOVE money. It simply helps you categorize and budget.

A screenshot of the Green Country Federal Credit Union online banking interface. The header shows the logo and name. Below it is a navigation bar with tabs: Overview, Account Access, Bill Pay, Popmoney, Money Manager, and Self Service. An orange arrow points to the Money Manager tab. Below the navigation bar is a sub-menu with links like Account Summary, Transfer Funds, etc. There are also buttons for Quick Transfer and Switch to Tile View. A Balances table is visible, showing account names, actual, and available amounts.

Account	Actual	Available
DayWood Checking	\$ 103.65	\$ 103.65
DayWood Savings	\$ 157.73	\$ 152.73
Savings	\$ 155.04	\$ 150.04
Tax Account	\$ 1,128.38	\$ 1,128.38

# 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

[VIEW ANALYZER >](#)

### 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

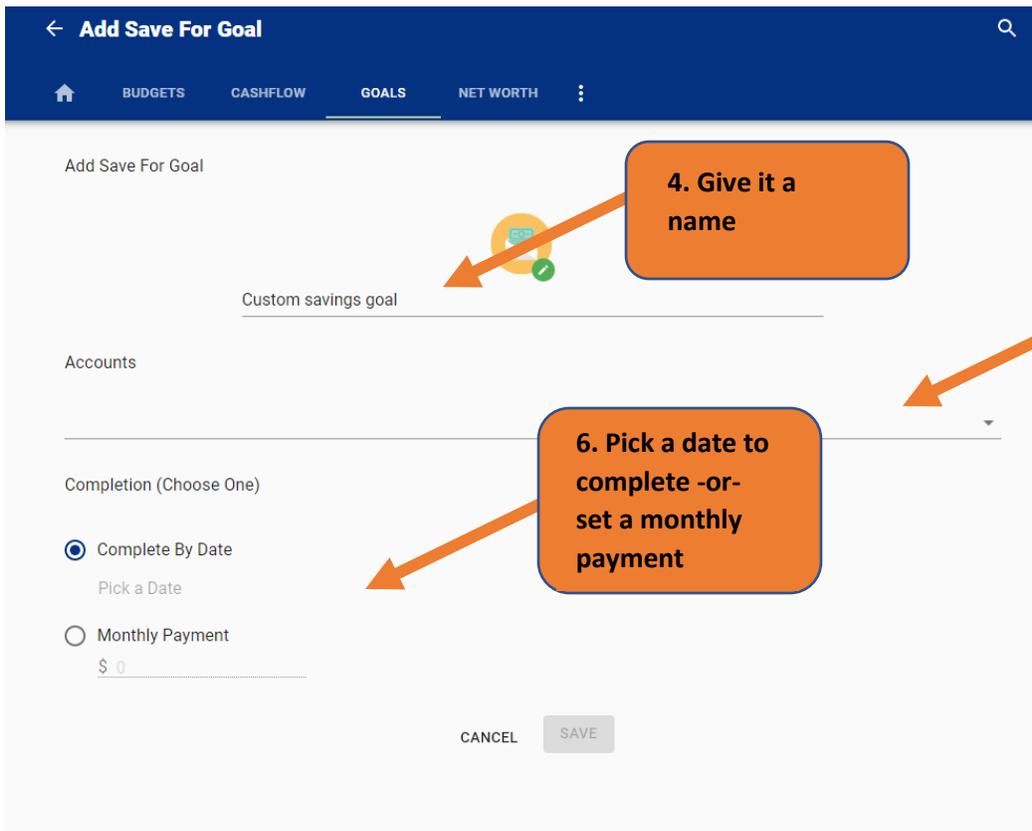
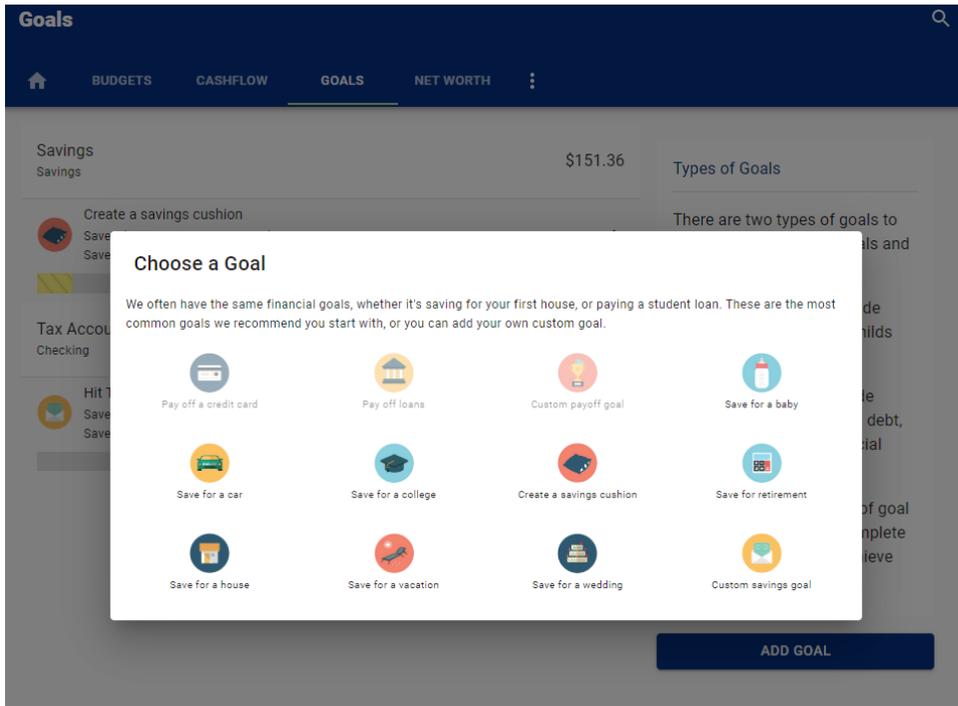
### Net Worth

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.

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Money Manager does a lot of other things as well – you can add outside accounts, see your cashflow, make a budget, monitor your spending and keep a picture of your net worth. We'll go into the other functions of Money Manager next time.