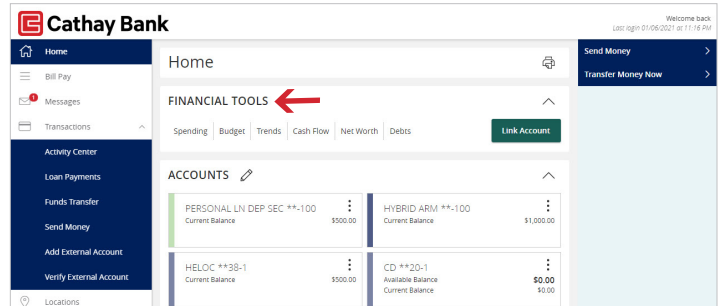
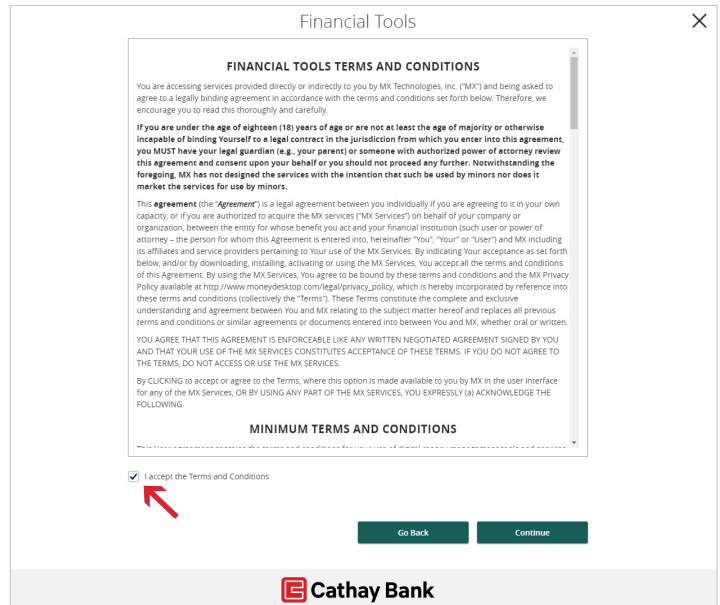


Financial tools

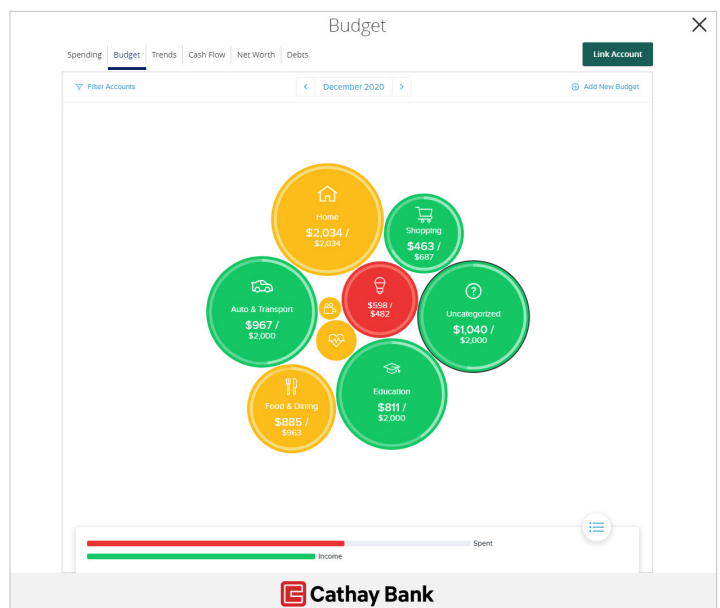
1. Financial Tools is located at the top of the Home page.



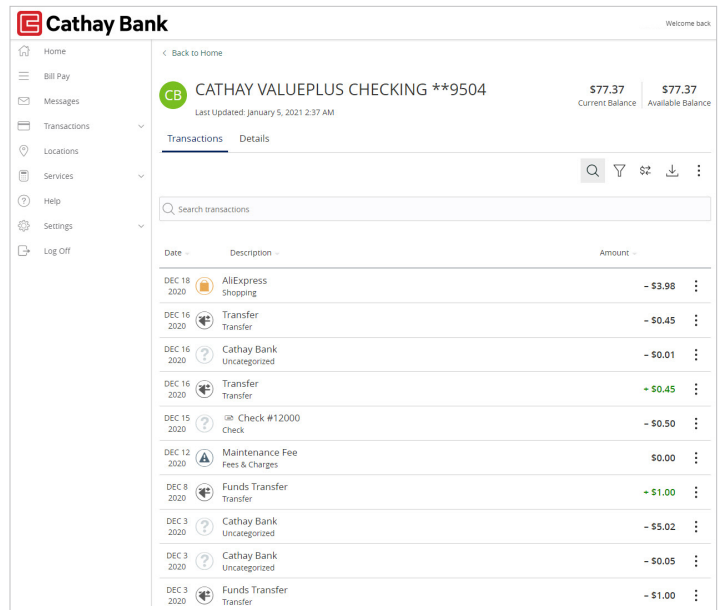
2. The first time you use Financial Tools, you will be asked to accept the Terms and Conditions by checking the box then clicking **Continue**.



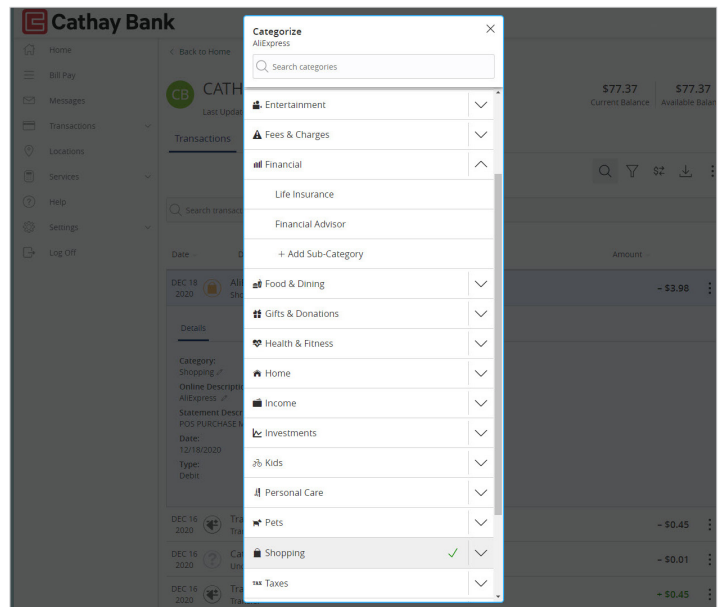
3. There are a variety of graphs with options you can choose to sort and filter the information about your accounts and transactions. These graphs help you make better financial planning decisions, as you can set a budget and track your progress against it.



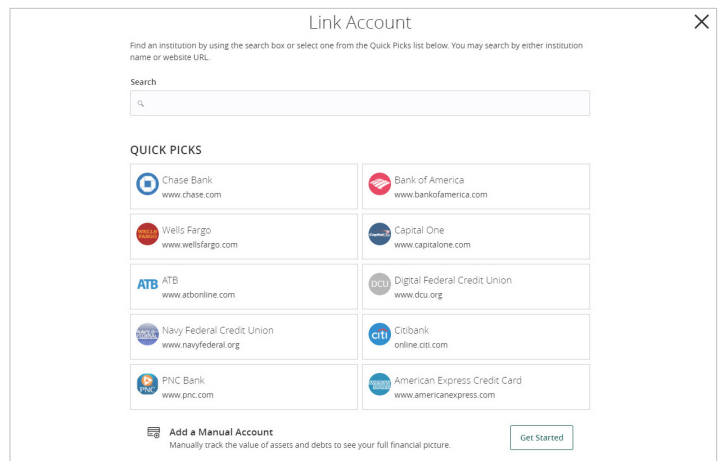
4. Financial Tools automatically categorizes every transaction for you.



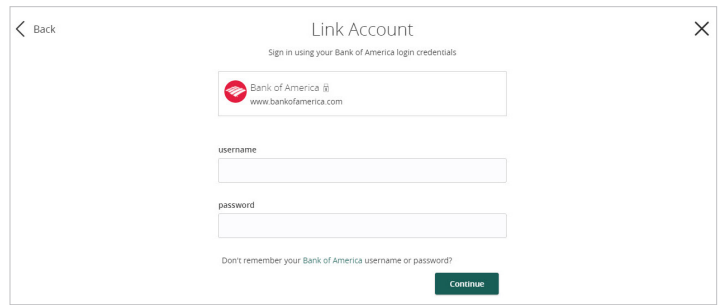
5. If you prefer, you can choose an existing category or sub-category, or you can add your own.



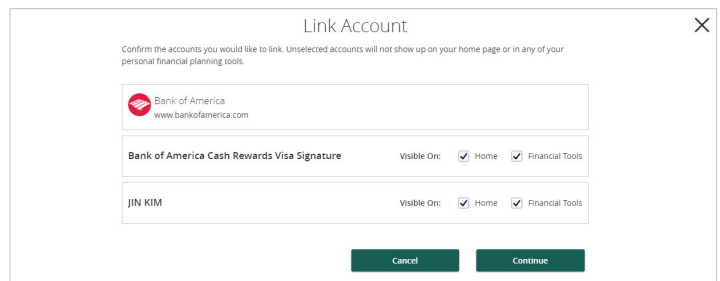
6. You can also link accounts you have at other financial institutions. Click on Link Account to connect to the other bank or credit union.



- When you have selected the other financial institution, enter your login details for that bank or credit union.



- When your accounts are available, you can choose which ones should be visible.



- Your accounts will appear in their own group, and the transaction history in these accounts will be included when you plan your finances.

