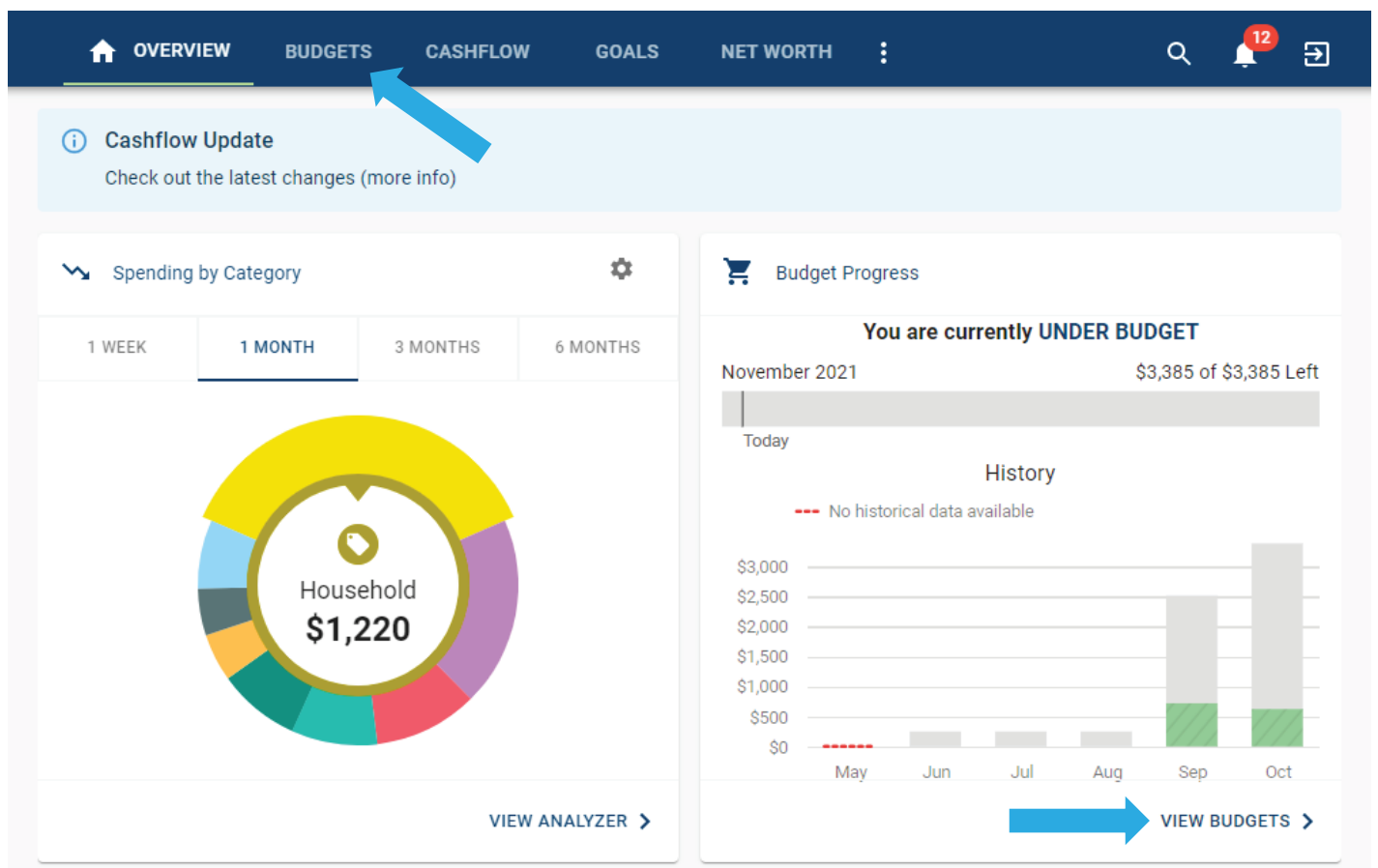


MY MONEY MAP

Personal Financial Management

How to Add a Budget

Step 1: Navigate to *PFM* and select the *View Budgets* button on your dashboard; or choose the *Budgets* tab on the toolbar.



Step 2: Click *Add Budget*.

← OCT November 2021 DEC ▶

You are currently UNDER BUDGET

All Budgets \$2,971 of \$2,985 Left

Today

Appliances Budget \$2,000 of \$2,000 Left >

Baby Expenses Budget \$200 of \$200 Left >

Books Budget \$50 of \$50 Left >

Car/Travel \$35 of \$35 Left >

Clothes Budget \$500 of \$500 Left >

Diningout Budget \$186 of \$200 Left >

History

No historical data available

Your total monthly Spending Budget is: **ON TRACK**

You've been under by **\$5,768** on all budgets over the last **8 months**.

Car/Travel **UPDATE** ×

You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.

Personal **+ CREATE** ×

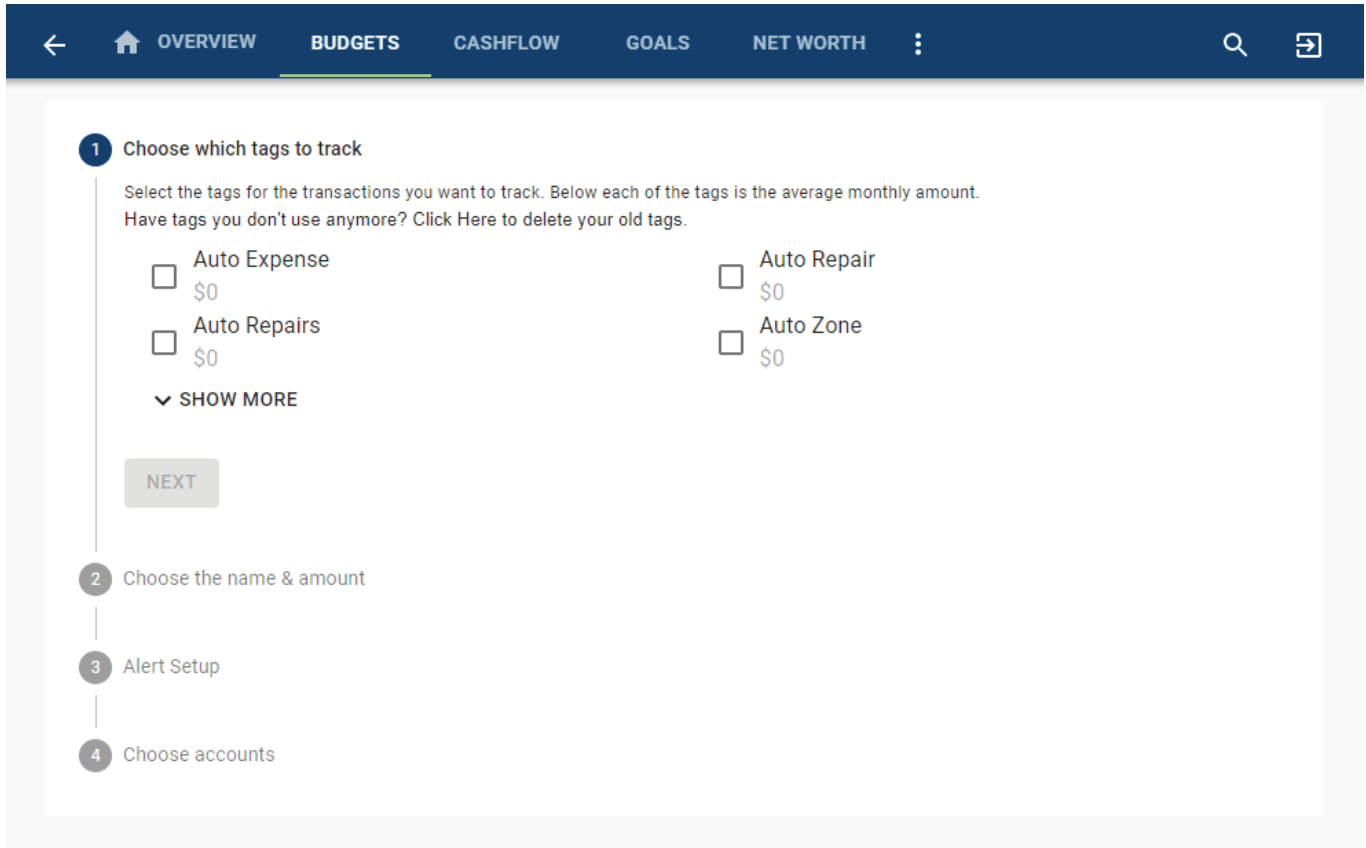
You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

ADD BUDGET

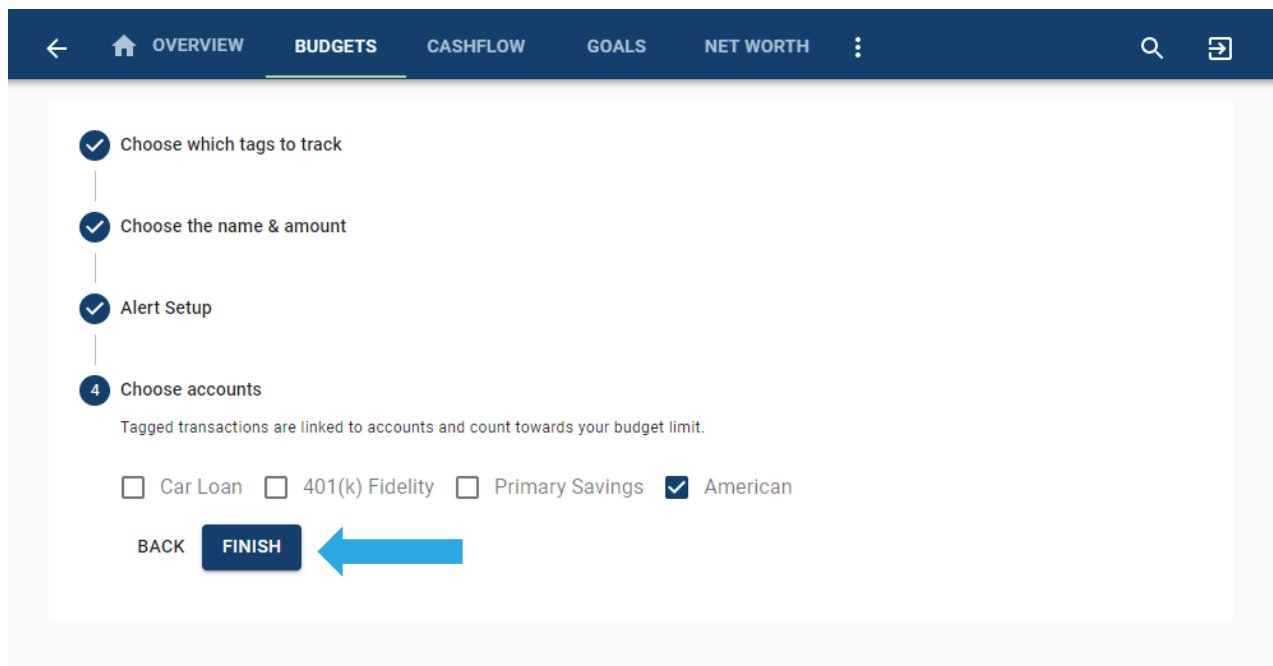
BUDGET ALERT

The More You Know: The *Budgets* tab also allows you to view and modify existing Budgets. You can adjust the tag associated with each budget you've created, increase/decrease budget amounts, rename, and even delete a budget by clicking into the appropriate one.

Step 3: Complete steps 1-4 on the screen by choosing which tag to track, establishing the name and budget amount, enrolling in alerts, and selecting which accounts to use for tracking your budget.



Step 4: Click *Finish*.



Step 5: Use *Budget Insights* to help meet your financial targets. Insights allows you to easily adjust your plans by using spending history to provide suggestions for staying on track.

The screenshot displays a budgeting application interface. At the top, a navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area shows the current month as 'November 2021' and a status of 'You are currently UNDER BUDGET'. A summary bar indicates 'All Budgets' with '\$3,044 of \$3,085 Left'. Below this, a list of budgets is shown with progress bars: Appliances Budget (\$2,000 of \$2,000 Left), Baby Expenses Budget (\$200 of \$200 Left), Books Budget (\$50 of \$50 Left), Car/Travel (\$35 of \$35 Left), Clothes Budget (\$500 of \$500 Left), Diningout Budget (\$186 of \$200 Left), and Entertainment Budget (\$73 of \$100 Left). To the right, a 'History' bar chart shows spending from May to October. A text box states 'Your total monthly Spending Budget is: ON TRACK' with a green checkmark and a blue arrow pointing to it. Below this, it notes 'You've been under by \$5,768 on all budgets over the last 8 months.' and lists 'Car/Travel' as a category with an 'UPDATE' button. Another section for 'Personal' spending shows 'You've spent an average of \$0 on Personal.' and a '+ CREATE' button. At the bottom right, there are two buttons: 'ADD BUDGET' and 'BUDGET ALERT'. A banner at the bottom left features a woman pointing at a house outline with the text 'Home ownership can be more than just a dream' and 'Mortgages'.