

# Say Hello to Money Manager

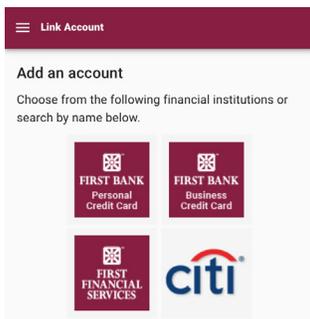


Money Manager is a tool embedded in First Bank mobile and online banking to help you organize all things financial in your life.



## Log in and get started

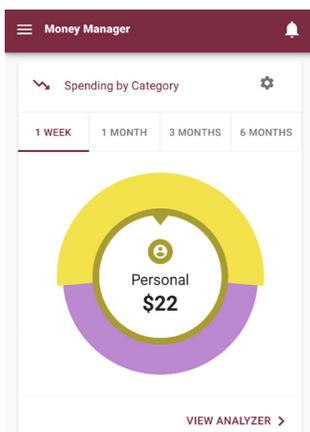
No need for another app or separate sign-in. Money Manager is part of First Bank Mobile and Online Banking. Every time you log in, it's right there and ready to go.



## See the big picture

Sync other accounts to see all your finances in one place.

- 1 Navigate to **Accounts** and click the plus sign to **Add Linked Account**.
- 2 Select an institution or use **Search** to find yours.
- 3 Enter the required information and click **Connect**. You'll get a notification on your Money Manager dashboard when an account has successfully synced.



## Track spending with the dashboard

Choose a timeframe for overall spending by category based on transaction tags.

- 1 Select sections of the wheel to see spending by category. Transactions will automatically categorize by type or tag.
- 2 Edit transactions to personalize their category or split them between tags.
- 3 Change transaction names, create budgets or add recurring transactions.

← New Budget

1 Choose which tags to track  
Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.

- Clothing \$0
- Diningout \$0
- Education \$0
- Entertainment \$0
- ▼ SHOW MORE

NEXT

2 Choose the name & amount

## Create spending targets to help budget

Look at spending targets for financial insights and budget guidance.

- 1 Navigate to **Budgets** and click **View Budgets**.
- 2 Choose the **Spending Target** you'd like to edit from the list.
- 3 Click Edit **Budget** to edit or delete. You can change the name, amount, tags and accounts associated each target.

Income Name \*

BILL INCOME

Amount \*

\$

Frequency \*

Start On Date

Sep 1, 2022

SAVE

## Bring your budget to life using cashflow

The cashflow option brings your budget to life through an interactive calendar.

- 1 Navigate to **Cashflow**.
- 2 Click the plus sign to add **Income** or a **Bill**.
- 3 Enter in the details and select **Save** to see a calendar of money going in and out.

Goals

### Choose a Goal

We often have the same financial goals, whether it's saving for your first house, or paying a student loan. These are the most common goals we recommend you start with, or you can add your own custom goal.

- Pay off a credit card
- Pay off loans
- Custom payoff goal
- Save for a baby
- Save for a car
- Save for a college
- Create a savings cushion
- Save for retirement
- Save for a house
- Save for a vacation
- Save for a wedding
- Custom savings goal

## Set goals to make things happen

Set goals to save for vacation, car, retirement, or for things like paying off a credit card or loan.

- 1 Navigate to **Goals** and select **Add Goal**.
- 2 Select your desired savings or pay off goal and fill in the details.
- 3 Click **Save** to add the goal. Goal progress will automatically update and reflect your day-to-day balances.

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