

Say Hello to Money Manager

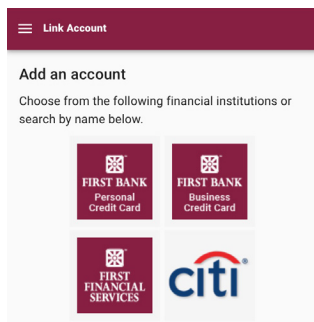


Money Manager is a tool embedded in First Bank mobile and online banking to help you organize all things financial in your life.



Log in and get started

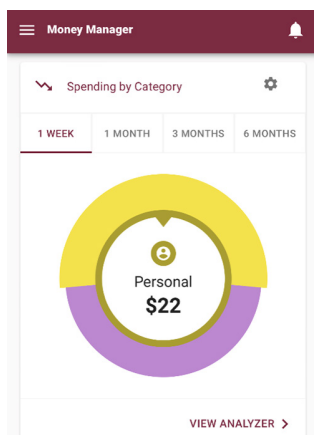
No need for another app or separate sign-in. Money Manager is part of First Bank Mobile and Online Banking. Every time you log in, it's right there and ready to go.



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
- Dining out \$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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