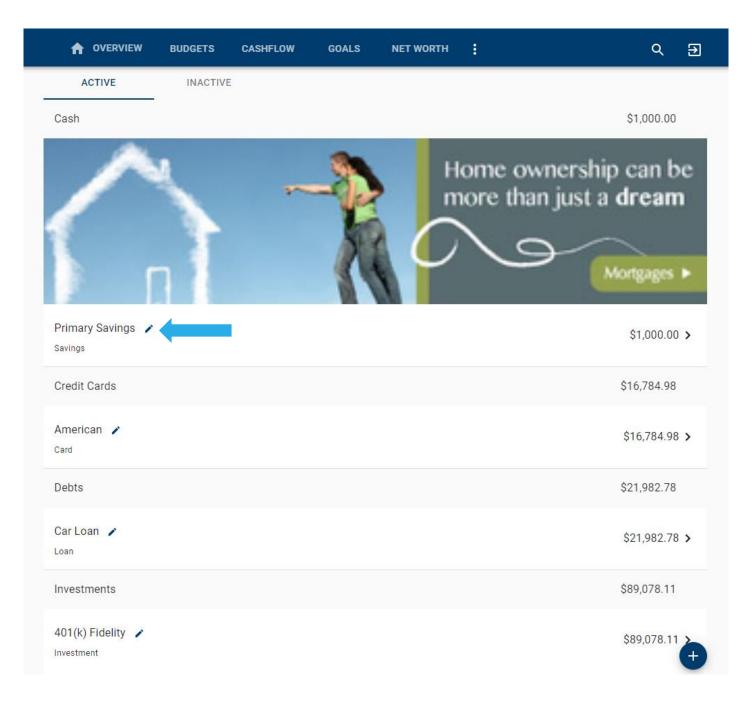


How to Add Accounts to be Viewable in PFM

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

OVERVIEW BUDGETS	CASHFLOW GOALS	NET WORTH	Transaction Search	Q 👎 🔁
f Accounts		Transact	Accounts Link Account	
Most Recent Activity	v	Most Recent A	Alerts Help	-
American 9 Debits this week	\$16,784.98 \$545.48	Tuesday, Nove	Miber 2, 2021	-\$6.83 >
Car Loan	\$21,982.78 >	Vonage American	🕴 Utilities	-\$10.95 >
401(k) Fidelity Primary Savings	\$89,078.11 > \$1,000.00 >	Check #125	🔖 personal	-\$200.00 >
_	VIEW ACCOUNTS >	American		VIEW TRANSACTIONS >
Goals Progress				
Custom savings goal 0% complete		Î		
Saved \$16	of \$500,000			
Pay off a credit card 0% complete				
Paid \$0	of \$16,785			



Step 2: Click the *Edit* pen/pencil button next to the account you are wanting to work with.

The More You Know: Our *PFM* feature allows you to aggregate in external accounts from outside of our Financial Institution in order to provide you with a full financial picture. Navigate to the *External Accounts* tab or choose the *Plus* icon in the bottom right of the above screen to begin linking.

Step 3: Complete the following fields – use the checkboxes to choose which PFM features to include this account in.

	CASHFLOW	GOALS	NET WORTH	:	Q	€
Name * Primary Savings						
Account Type * Savings						•
Preferred Balance Type * Automatic						Ŧ
□ Include this account in all features						
Include in Dashboard						
Include in Expenses						
Include in Budget						
Include in Cashflow						
Include in Goals						
Include in Networth						
	С	ANCEL	SAVE			

Step 4: Click Save.