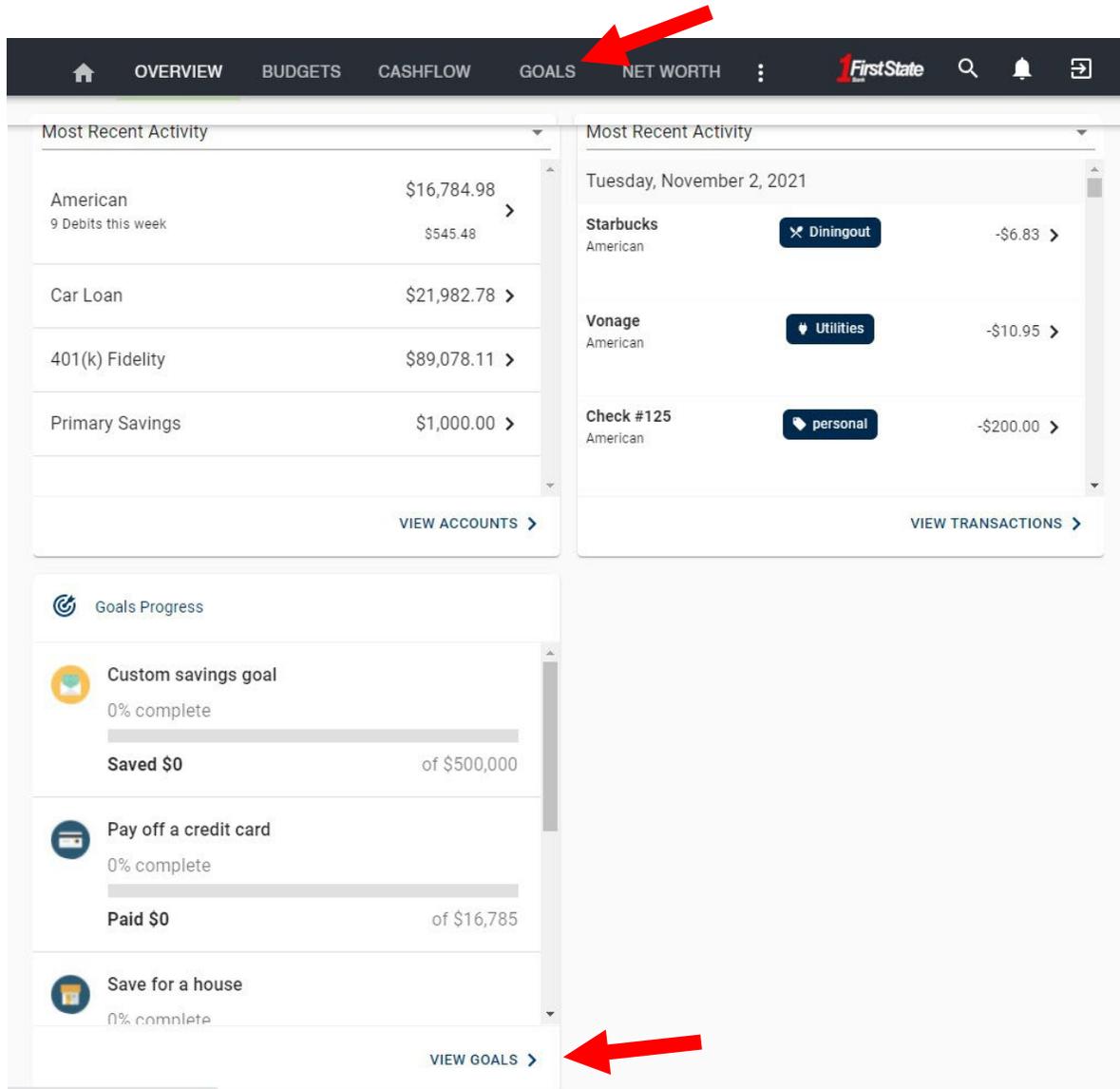


How to Add a Goal in Insights

- 1) Navigate to Insights and select the “View Goals” button on your dashboard or choose the “Goals” tab on the toolbar.



The screenshot displays the First State Bank dashboard with the 'GOALS' tab selected in the top navigation bar. A red arrow points to this tab. Below the navigation bar, the dashboard is divided into two main columns. The left column shows 'Most Recent Activity' with a list of accounts and their balances: American (\$16,784.98), Car Loan (\$21,982.78), 401(k) Fidelity (\$89,078.11), and Primary Savings (\$1,000.00). A red arrow points to the 'GOALS' tab in the top navigation bar. Below the activity list is a 'Goals Progress' section with three goal cards: 'Custom savings goal' (0% complete, Saved \$0 of \$500,000), 'Pay off a credit card' (0% complete, Paid \$0 of \$16,785), and 'Save for a house' (0% complete). A red arrow points to the 'VIEW GOALS >' button at the bottom of this section. The right column shows 'Most Recent Activity' for Tuesday, November 2, 2021, with transactions from Starbucks (-\$6.83), Vonage (-\$10.95), and Check #125 (-\$200.00). A 'VIEW TRANSACTIONS >' button is at the bottom of this column.

Account	Balance
American	\$16,784.98
Car Loan	\$21,982.78
401(k) Fidelity	\$89,078.11
Primary Savings	\$1,000.00

Transaction	Category	Amount
Starbucks	Diningout	-\$6.83
Vonage	Utilities	-\$10.95
Check #125	personal	-\$200.00

2) Click “Add Goal”.

Primary Savings Savings \$1,000.00

Custom savings goal
Saved \$16.00 towards goal of \$500,000.00
Save \$400.00 monthly to complete on 10/20/2125

Save for a house
Saved \$84.00 towards goal of \$50,000.00
Save \$1,960.00 monthly to complete on 11/18/2023

American Card \$16,784.98

Pay off a credit card
Paid \$0.00 towards goal of \$16,784.98
Pay \$1,400.00 monthly to complete on 10/20/2022

Types of Goals

There are two types of goals to choose from: Save for Goals and Pay Off Goals.

Save for Goals could include saving for a house, car, or college fund.

Pay Off Goals could include paying off your credit card debt, short and long term financial goals.

Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals

ADD GOAL

ADD GOAL ALERT

The More You Know: The “Goals” tab also allows you to view and modify existing Goals. You can rename, increase/decrease goal amounts, and even modify the accounts to track by clicking into the appropriate one.

3) Choose one of our suggested goal types or click the “Custom Savings Goal” to create one of your own.

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.

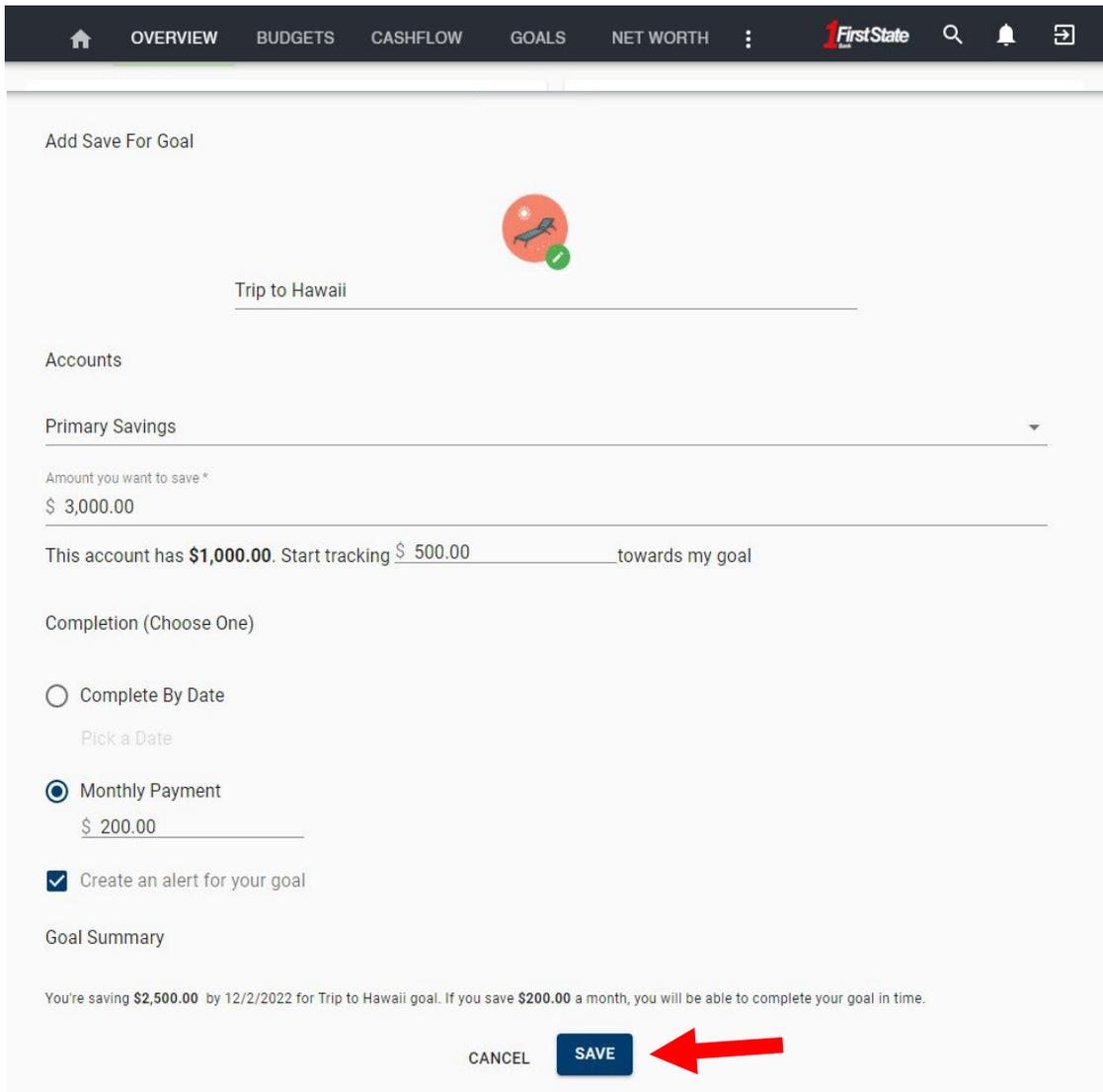
- Pay off a credit card
- Pay off loans
- Custom payoff goal
- Save for a baby
- Save for a car
- Save for a college
- Create a savings cushion
- Save for retirement
- Save for a house
- Save for a vacation
- Save for a wedding
- Custom savings goal

Pay off a credit card
Paid \$0.00 towards goal of \$16,784.98
Pay \$1,400.00 monthly to complete on 10/20/2022

Home ownership can be more than just a dream
Mortgages ▶

ADD GOAL
ADD GOAL ALERT

- 4) Complete the following fields related to the goal you are establishing. “This account has [dollar amount]. Start tracking [dollar amount] towards my goal” field allows you to consider a dollar amount of your choosing already available in the account used to monitor your goal. If you would like to begin saving for this goal starting at \$0, enter a zero in the dollar amount field. In the example below, the user’s Primary Savings account has a current balance of \$1,000.00. They are choosing to apply \$500.00 of that \$1,000.00 to their “Trip to Hawaii” goal.



Home OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH First State

Add Save For Goal

Trip to Hawaii

Accounts

Primary Savings

Amount you want to save *

\$ 3,000.00

This account has **\$1,000.00**. Start tracking \$ 500.00 towards my goal

Completion (Choose One)

Complete By Date

Pick a Date

Monthly Payment

\$ 200.00

Create an alert for your goal

Goal Summary

You're saving **\$2,500.00** by 12/2/2022 for Trip to Hawaii goal. If you save **\$200.00** a month, you will be able to complete your goal in time.

CANCEL SAVE

- 5) Click “Save”.

Note: Insights does not move money, it is a tool to suggest how to save to reach your goal.