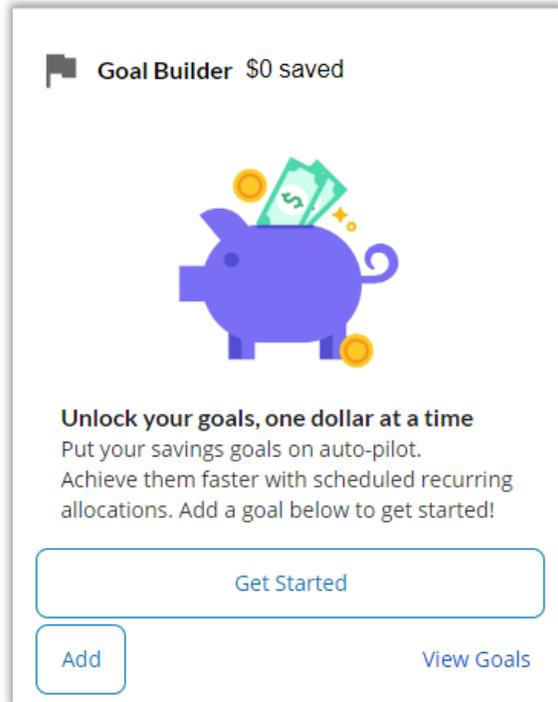


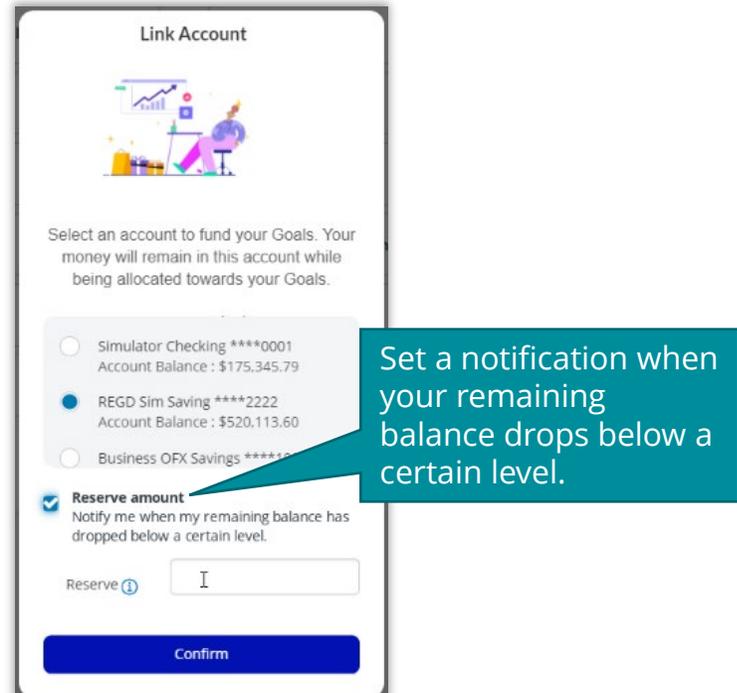
Creating Your Goal:

Follow these steps to create your goal.

1 Select **Get Started** or **Add**.

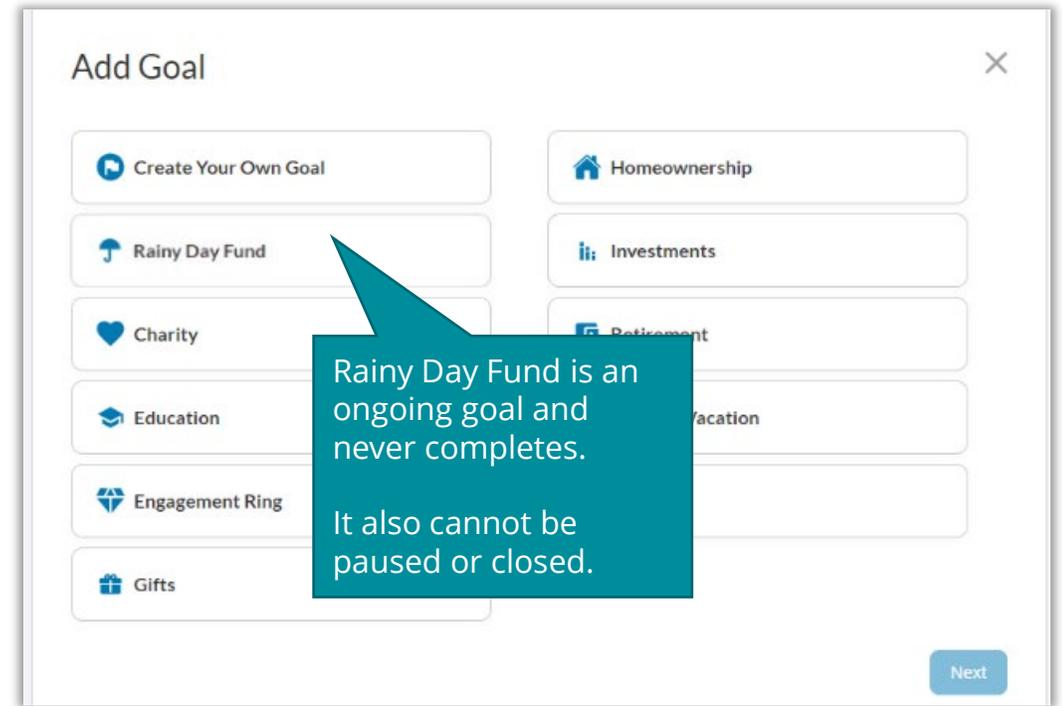


2 Select **Account***



*only one account can be used.

3 Choose Goal Type: Select from premade or use the Create Your Own Goal option.



4 Give your goal a name

5 Edit goal amount

- Chart: Pencil Icon
- Chart: Slider
- Text Entry

6 Choose Start and Target* dates

*changing target date will determine how much money will be allocated based on the frequency of the occurrence.

7 Choose how often the allocation occurs

The graph will adjust as the information changes.

The screenshot displays the 'Goal Builder' interface with three steps: 1. Goal Amount, 2. Set Ongoing Allocation, and 3. Review. The 'College' goal name is highlighted in a yellow box. Below the goal name, there is a text entry field for the goal amount, currently set to '\$4,000', which is highlighted with a blue box. The 'Start Date' is set to 'Dec 31, 2023' and the 'Target Date' is set to 'Dec 31, 2024', both highlighted with green boxes. A line graph shows the 'Estimated Goal Amount' over time, with data points at 5M (\$1538), 9M (\$2769), and 1.1Y (\$4000). The goal amount '\$4,000' is also highlighted with a blue box above the graph. Below the graph, the allocation frequency is set to '\$150 Every 2 Weeks', highlighted with an orange box. A blue arrow points to the right at the bottom of the interface.

8

Choose to Add to the goal today

9

Determine Allocation type:

- Recurring
- Percentage of account deposits

10

Edit Allocation Amount – or keep it at the calculated amount

11

Determine frequency and timing:

- Frequency
- On what date(s)
- How long the allocation will be made

Select next and review and confirm your goal.

Managing Your Goal

The Goals Summary page includes Active, Completed and Inactive Goals.

Add a new or edit existing goals. You can temporarily disable a goal via this button.

Active Goals:
All goals actively allocating funds. Rainy Day Fund will always be active and at the top.

The screenshot shows the 'All Goals' interface. At the top, there are '+ Add' and 'Edit' buttons. Below is a descriptive paragraph: 'With your savings goals it's like having digital piggy banks for your savings, without opening multiple accounts. As you save, you can see your progress toward each goal, however your money will remain in your linked account.' The page is divided into three sections: 'Active Goals' (containing 'Rainy Day Fund' with a goal amount of \$5,000.00 and 100% progress), 'Completed Goals' (containing 'Travel & Vacation' with a goal amount of \$10,000.00, completed on Oct 20th, 2023), and 'Inactive Goals' (containing 'Charity' with a goal amount of \$1,000.00 and 5% progress).

The 'Editing All Goals' modal window shows a 'Funding Account' section for 'Personal Checking *9022' with an account balance of \$5,200.00 and a remaining balance of \$4,200.00. Below this, there is a 'Reserve' section with a toggle switch. The main part of the modal is a list of goals with their goal amounts and active status (toggle switches): 'Rainy Day Fund' (\$10,000.00, active), 'College' (\$4,000.00, active), 'Education2' (\$100.00, active), and 'Homeownership' (\$25,000.00, active). At the bottom, there are '+ Add' and 'Save' buttons.

Inactive Goals:
Goals that are incomplete and have been paused by the user.

Completed Goals:
All goals that have been met but not closed or Met and closed by the user.

The allocation calculator lets the user see how much they would have to allocate and for how long in order to reach their goal.

Allocation Calculator

Target your dreams with precision and unlock new adventures one dollar at a time, setting aside funds every week, month, or per paycheck.

To get started, enter below:

1. How much you want to save
2. When you want to save it by
3. How much you want to contribute
4. How frequently you want to contribute

A little bit over time can go a long way - you got this!

Goal Amount:

Start Date:

Target Date:

Estimated Goal Amount

\$0

5M 9M 1.1Y

\$0 Monthly

All Goals

+ Add Edit

With your savings goals it's like having digital piggy banks for your savings, without opening multiple accounts. As you save, you can see your progress toward each goal, however your money will remain in your linked account.

Active Goals

Oldest

- Rainy Day Fund**
Goal Amount: \$10,000.00
Progress: 10%
Recurring allocation of \$115 Weekly
- Homeownership**
Goal Amount: \$25,000.00
Progress: 0%
- Education2**
Goal Amount: \$100.00
Progress: 0%
- College**
Goal Amount: \$4,000.00
Progress: 0%

Completed Goals

Funding Account

Personal Checking *9022
You have money in your Remaining Balance that you can allocate to other goals.
Account Balance: \$5,200.00
Remaining Balance: \$4,200.00

Do More with Your Goals

Use the savings calculator to determine how much you'll allocate to reach your goal by the time you want. A little bit over time can go a long way - you got this!

Allocation Calculator

Manage your goal allocations for goals built on a recurring schedule, or those based on a percentage of your deposits - viewing them all at once!

Recurring Percentage

Recurring

Edit recurring allocations

Funding Account

Personal Checking *9022
You have money in your Remaining Balance that you can allocate to other goals.
Account Balance: \$5,200.00
Remaining Balance: \$4,200.00

Select a goal to adjust its recurring allocation

- Rainy Day Fund**
Recur every Tuesday for \$115.00
Goal Amount: \$10,000.00
Target Date: 5/29/2025
- College**
Recur every 2 week on Monday for \$150.00
Goal Amount: \$4,000.00
Target Date: 12/30/2024
- Education2**
Recur every day for \$14.00
Goal Amount: \$100.00
Target Date: 11/23/2023
- Homeownership**
Recur every month on the 1st for \$347.00
Goal Amount: \$25,000.00
Target Date: 12/16/2029

Allocation Amount:

From:

Frequency:

On:

Until:

Save

Percentage

Edit percentage allocations

Funding Account

Personal Checking *9022
You have money in your Remaining Balance that you can allocate to other goals.
Account Balance: \$5,200.00
Remaining Balance: \$4,200.00

Adjust your percentage of every deposit for each goal

None of your goals are set up to allocate from a percentage of each deposit.

With this tool, a user can see and edit all of their recurring goals and percentage goals at once.