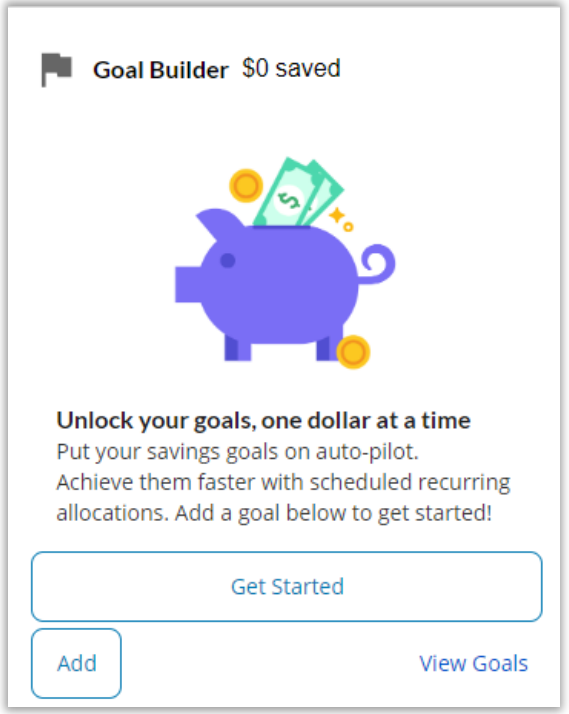
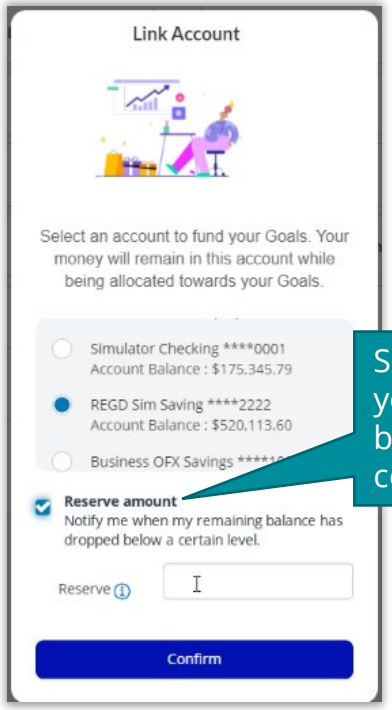
Creating Your Goal:

Follow these steps to create your goal.

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



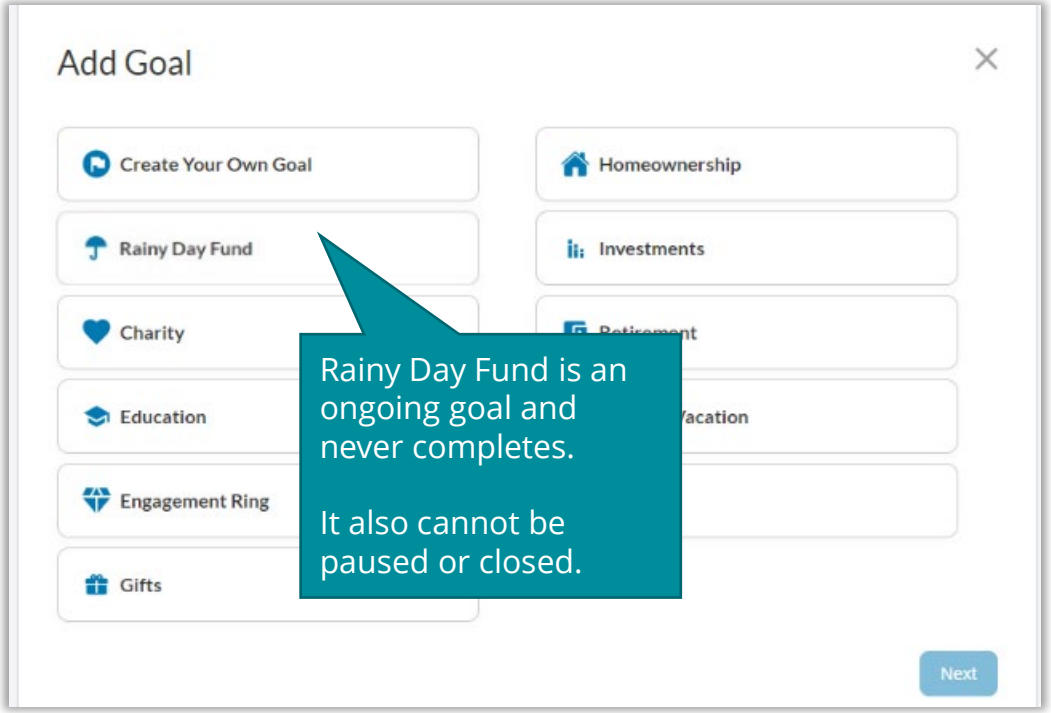
2 Select **Account***



Set a notification when your remaining balance drops below a certain level.

*only one account can be used.

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



Rainy Day Fund is an ongoing goal and never completes.

It also cannot be paused or closed.

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4 Give your goal a name

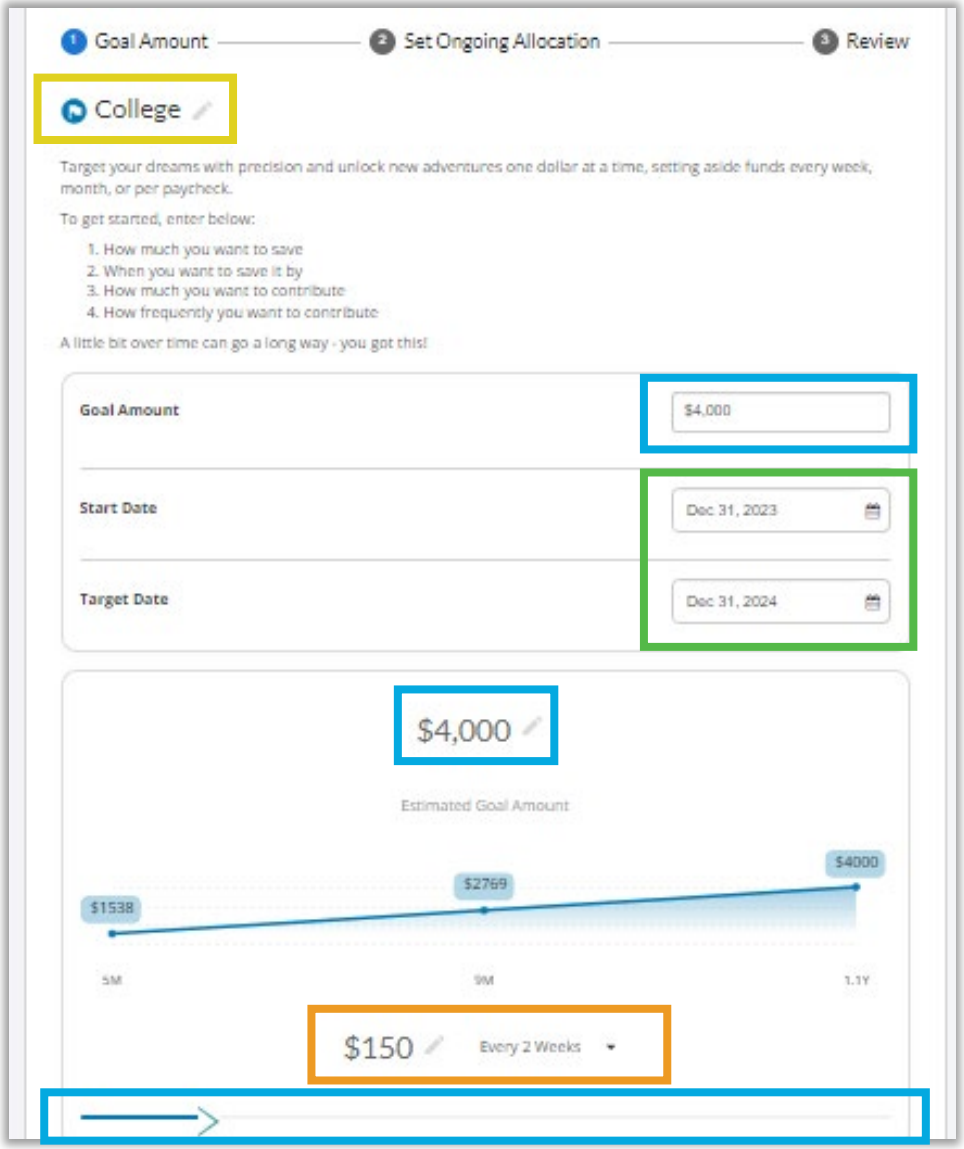
5 Edit goal amount
- Chart: Pencil Icon
- Chart: Slider
- Text Entry

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.



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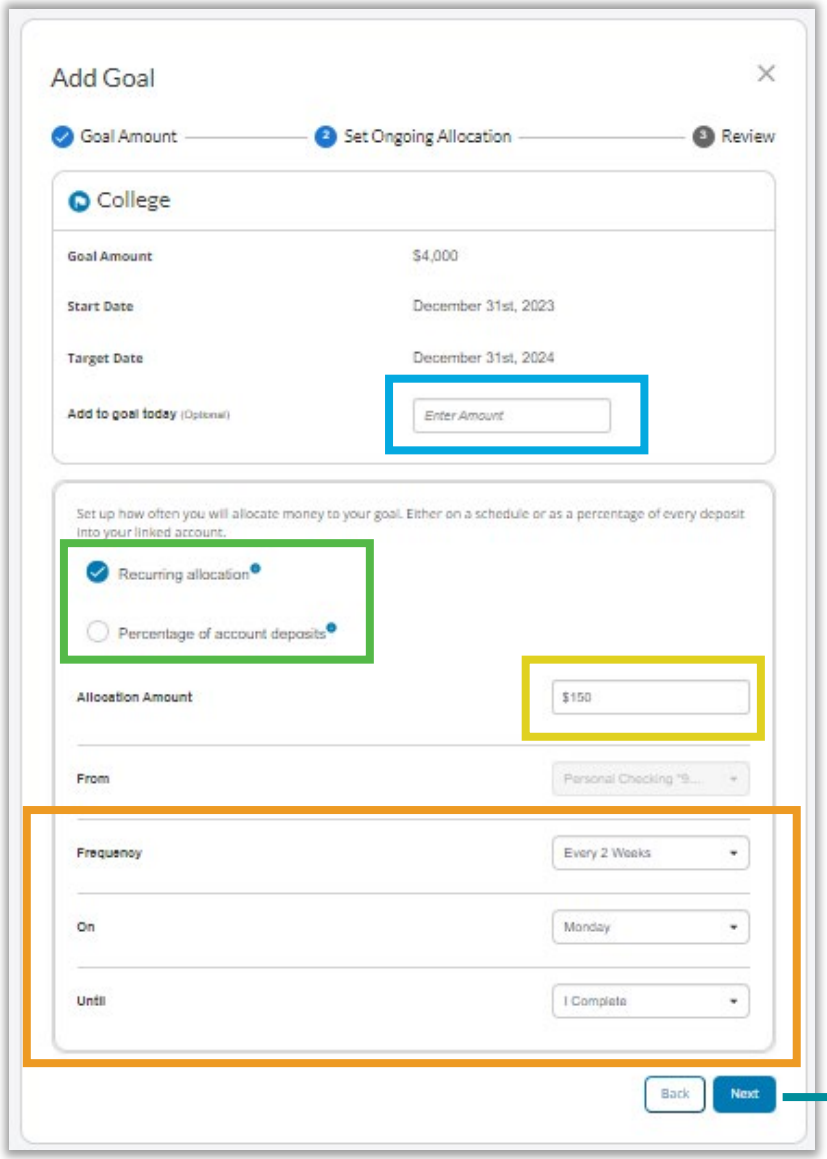
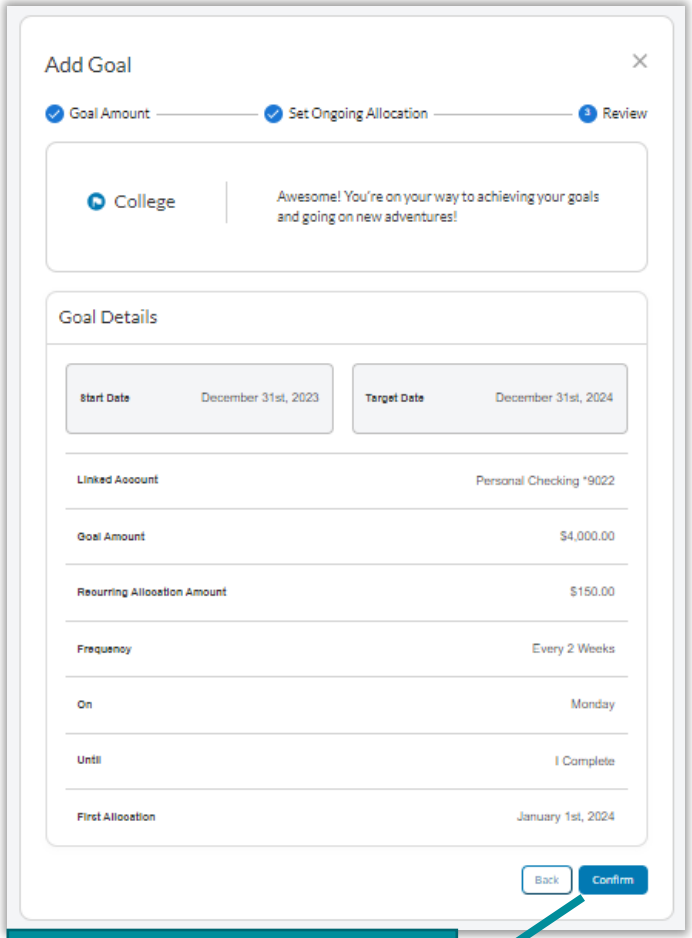
8 Choose to Add to the goal today

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.

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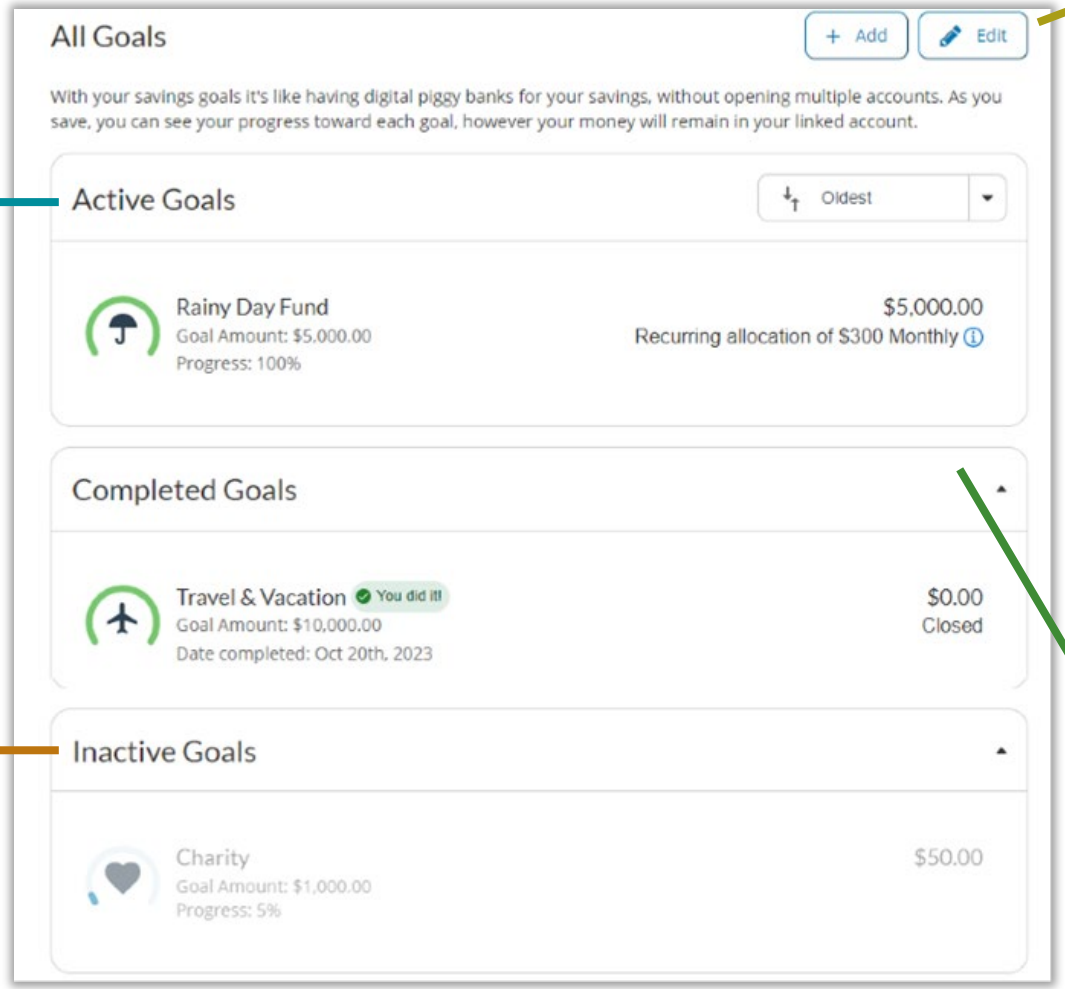
Managing Your Goal

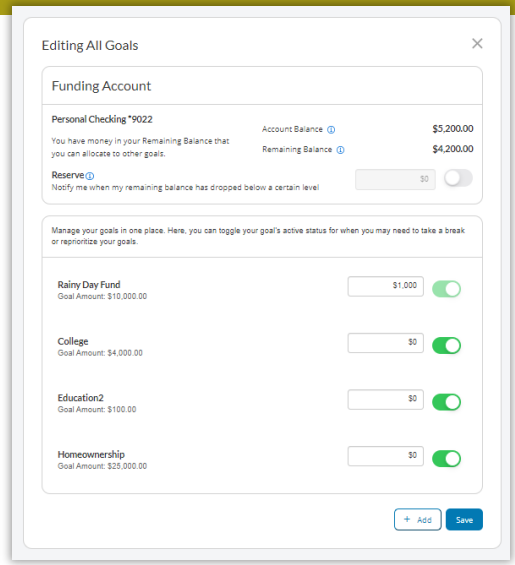
The Goals Summary page includes Active, Completed and Inactive Goals.

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

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



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



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

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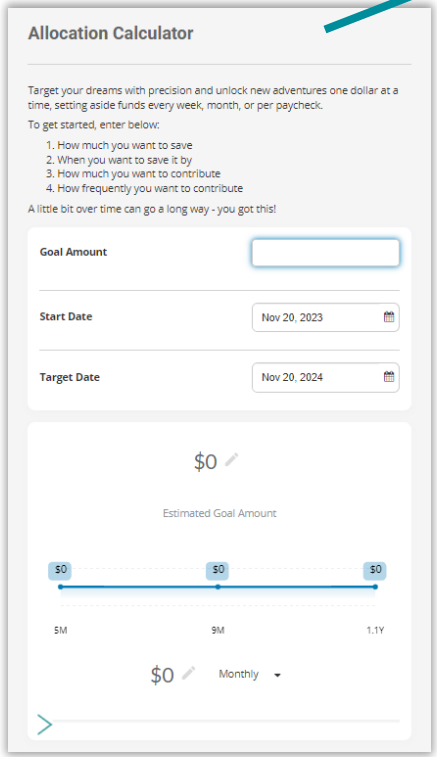
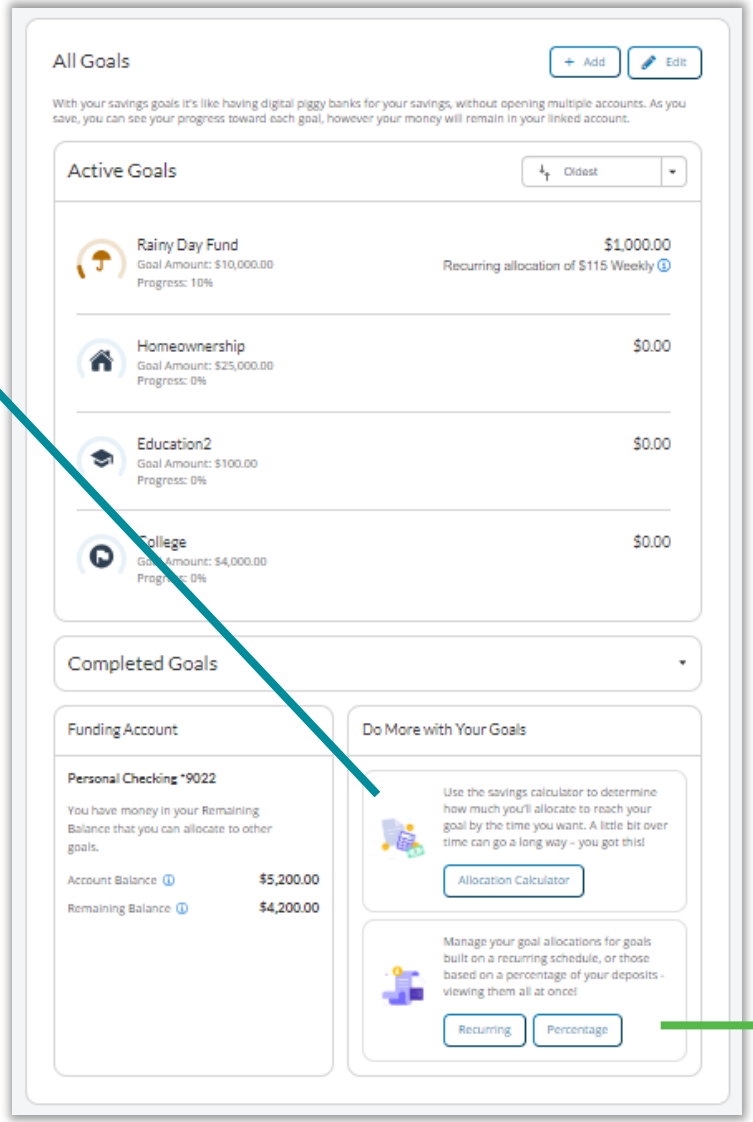
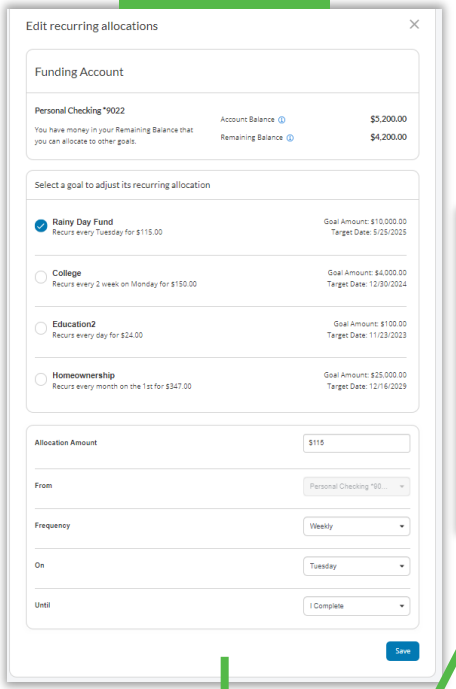
The allocation calculator lets the user see how much they would have to allocate and for how long in order to reach their goal.

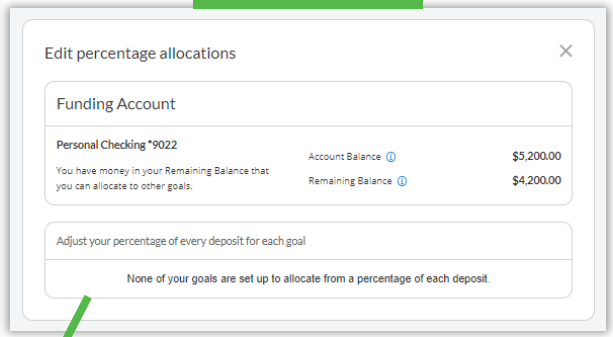




Recurring



Percentage



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

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