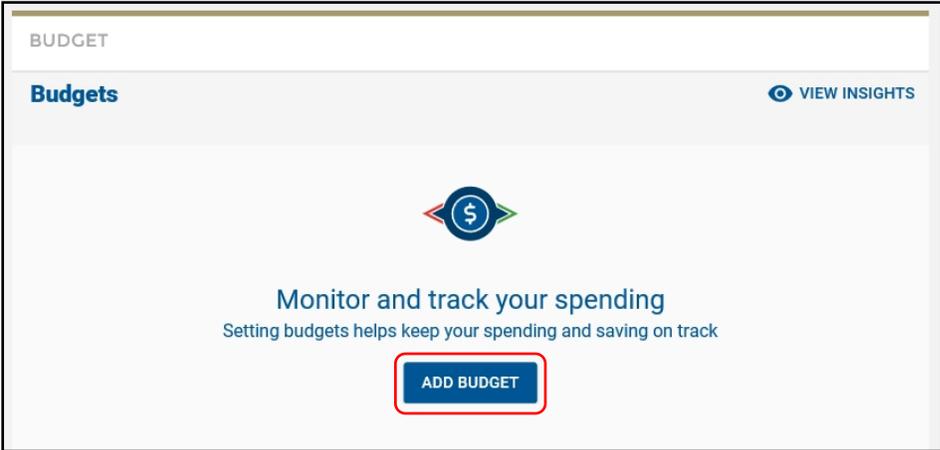
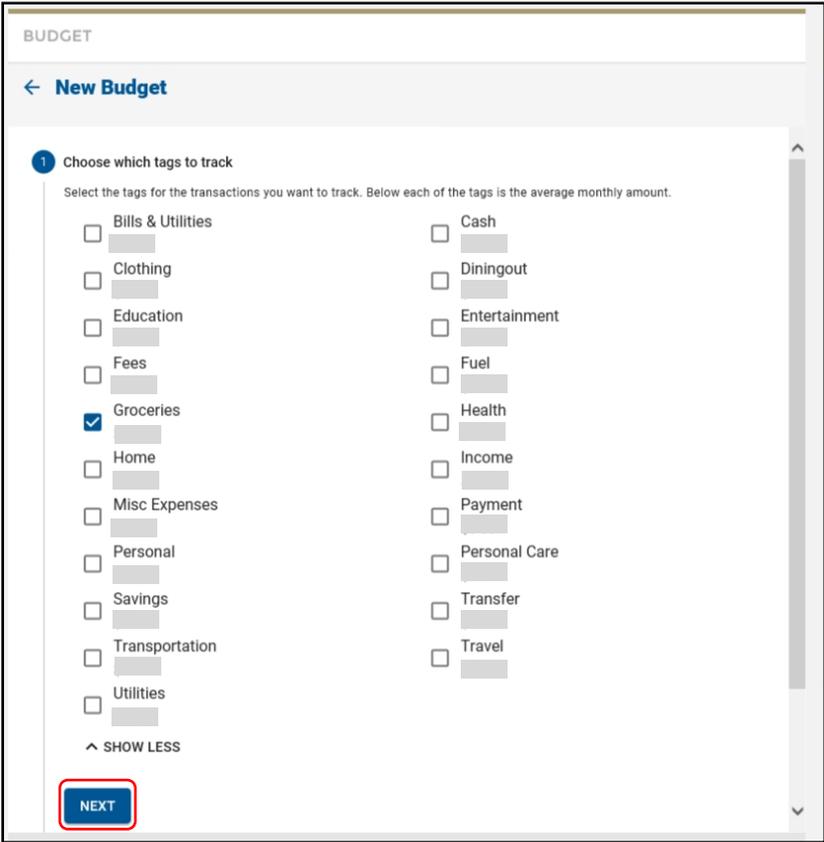


How to set up a Budget

- Under the budget section of “My Money Manager” click “Add Budget”



- Choose which tag you would like to set a budget for
- Click “Next”



- Choose a “Budget Name”
- Choose a “Monthly Limit”
- Click “Next”

The screenshot shows the 'BUDGET' app interface. At the top, it says 'BUDGET' and 'New Budget'. A progress indicator shows three steps: 1. Choose which tags to track (checked), 2. Choose the name & amount (active), and 3. Choose accounts. In step 2, there are two input fields: 'Budget Name' with the text 'Groceries Budget' and 'Monthly Limit' with the text '\$ 250'. Below these fields are 'BACK' and 'NEXT' buttons. The 'NEXT' button is highlighted with a red box.

- Do you want to create an alert for your budget?
 - If yes, check “Create an alert for your budget”
 - If no, uncheck “Create an alert for your budget”
- Click “Next”

The screenshot shows the 'BUDGET' app interface. At the top, it says 'BUDGET' and 'New Budget'. A progress indicator shows four steps: 1. Choose which tags to track (checked), 2. Choose the name & amount (checked), 3. Alert Setup (active), and 4. Choose accounts. In step 3, there is a checkbox labeled 'Create an alert for your budget' which is checked. Below this checkbox are 'BACK' and 'NEXT' buttons. The 'NEXT' button is highlighted with a red box.

- Choose which accounts you would like counted toward your budget
- Click “Finish”

BUDGET

← New Budget

✓ Choose which tags to track

✓ Choose the name & amount

3 Choose accounts

Tagged transactions are linked to accounts and count towards your budget limit. Shelby's Checking HSA

Savings (Closed) Regular Shares Indirect Used Auto 4683

BACK **FINISH**

- If you would like to receive notifications about this budget enter your phone number or email
- Click “Save”
- If not, Click “Stop Notifications”

BUDGET

Edit Destinations ×

If you would like to get alerts about this Budget, please provide contact information. You can view or change all of your alerts in the alerts section.

Phone

Email

SAVE

STOP NOTIFICATIONS

- You are now able to see how much you have used of each budget and what you have left

