



## Track your cash flow

See down to the penny how much money you have coming in — and going out — each month. Simply log your income and bills into the cash flow calendar. Here's how:

- Step 1:** Navigate to the “Cashflow” section.
- Step 2:** Click the plus sign to add your income or bills.
- Step 3:** Put in your monthly income and expense amounts to calculate your monthly cash flow.

## Create savings goals

You can set up goals to help you plan ahead — like saving for a vacation or paying off credit card debt. Once that's done your Goal Summary will show you the completion date and the amount you need to save each month.

- Step 1:** Navigate to the “Goals” section and select “Add Goal.”
- Step 2:** Select your desired pay off or savings goal.
- Step 3:** Fill out the name of the goal, which accounts you'll use and your target date.
- Step 4:** Click “Save.” Your goals will automatically update based on your progress and day-to-day account balance.

## Add another account

You can sync accounts from other financial institutions to get a full picture of your finances.

- Step 1:** Navigate to the “Accounts” section.
- Step 2:** Click the plus sign to “Add Linked Account.”
- Step 3:** Select an institution or use the search to find your institution. Follow the prompts to add your institution.

Try our tool today — It's a smarter way to manage your money

Contact Pioneer ppalachia FC if you have any questions