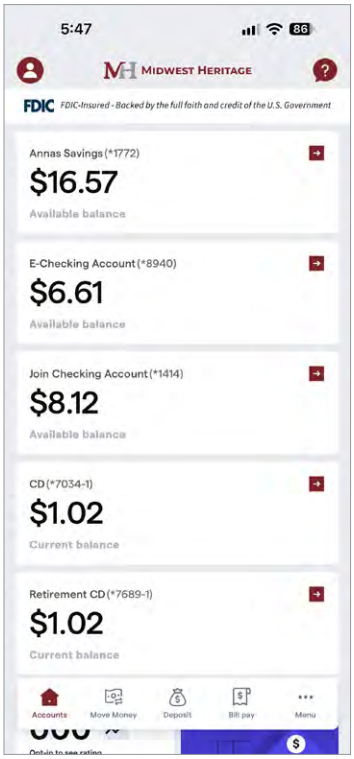
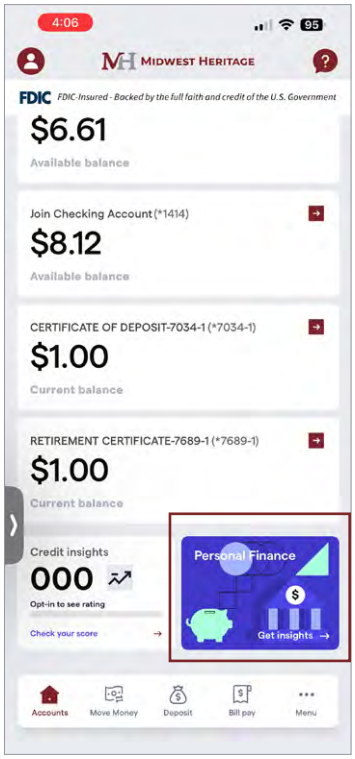
MIDWEST HERITAGE
A HY-VEE COMPANY

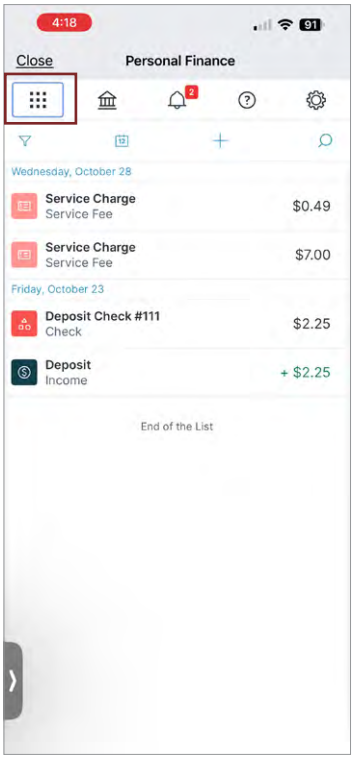
Member FDIC

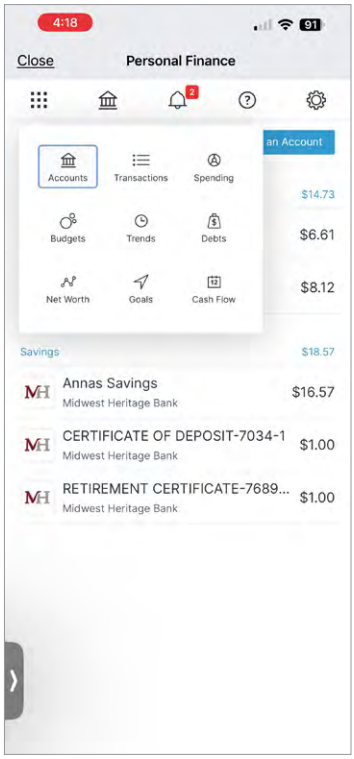
Quick Guide:

How to Access/Use Financial Tools (Mobile)

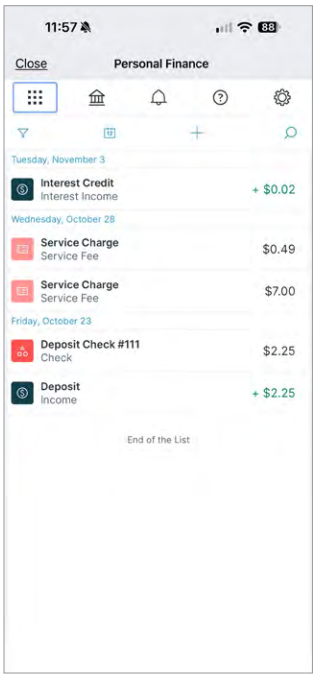




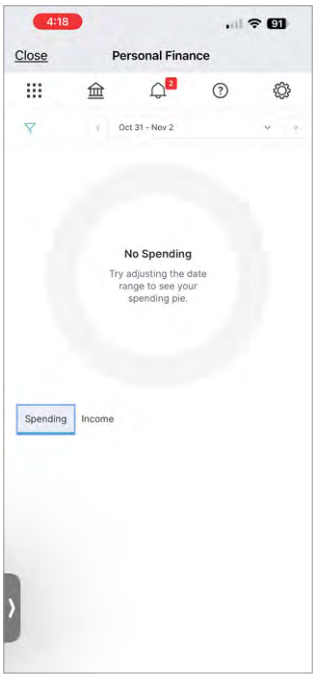




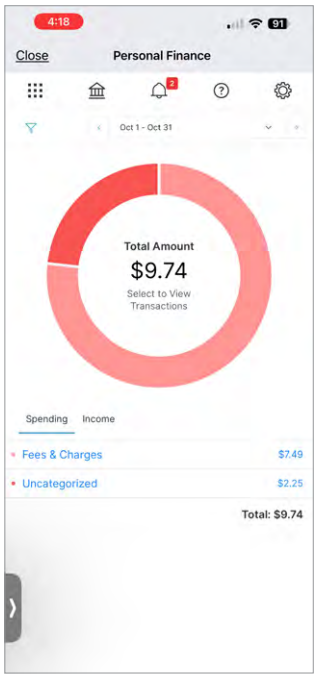
To access **Personal Finance** tools tap on the Personal Finance section on the bottom of your home page. Within the Personal Finance dashboard you are able to see all features by clicking the 9 dots icon in the top left corner.



Transactions



Spending (no transactions)



Spending

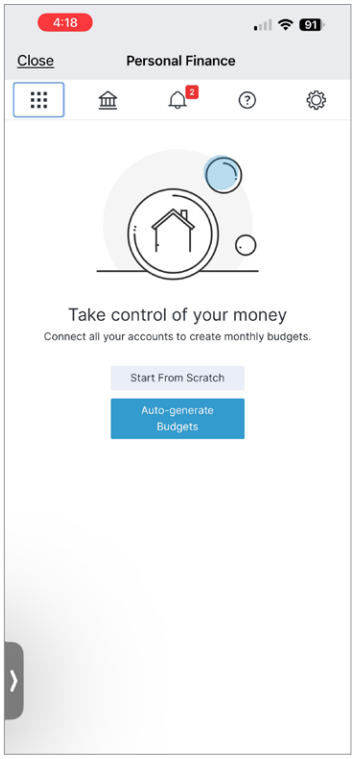
Transactions Tab

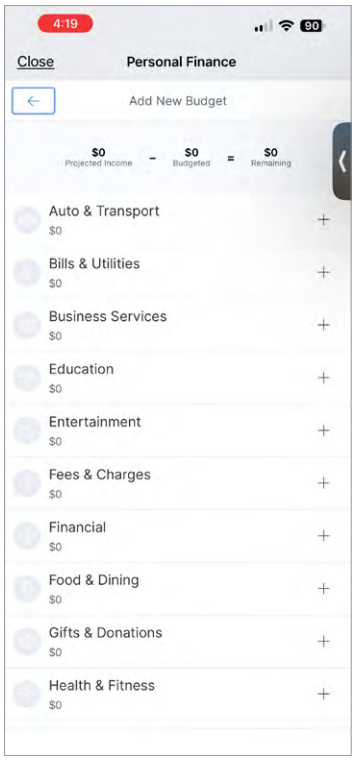
You are able to **view** your transactions and **filter by account and date** within the transactions tab. You are also able to **manually add transactions** and **search** for them.

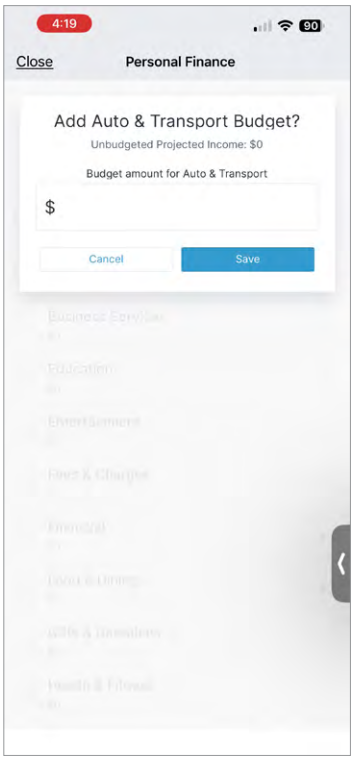
Spending Tab

You are able to **view your spending and income** as well as **filter** your spending **by account and date.**

Budgets Tab



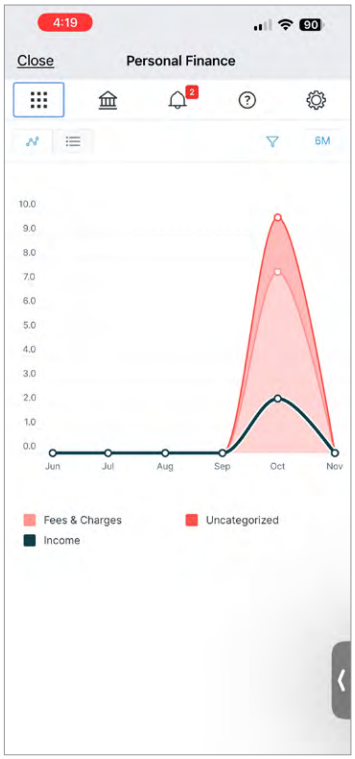




Within the Budgets tab, you can **create a budget from scratch** or **automatically generate one** based on your transactions. If you choose to create a budget manually, you can select from a **variety of categories**.

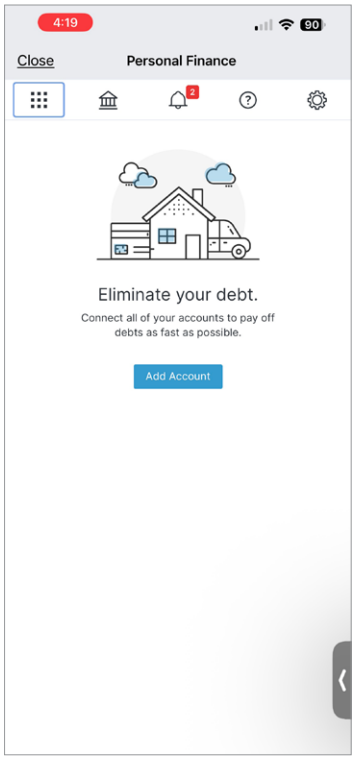
To add a budget select a category and press the plus sign icon on the right.

To automatically generate a budget, you must have **at least two months of transaction history**.



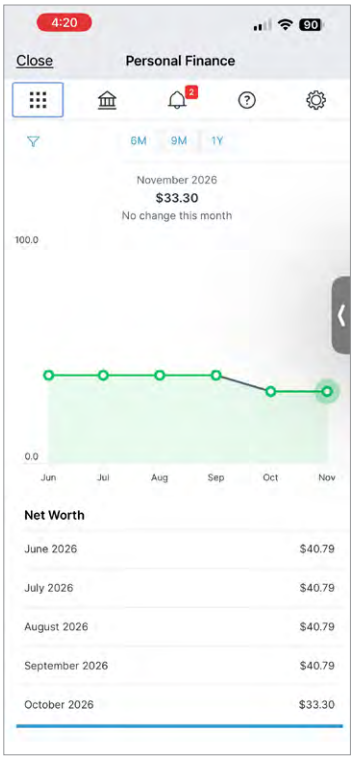
Trends Tab

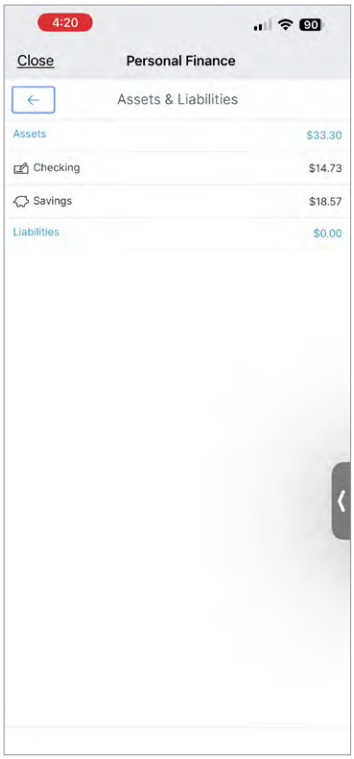
Within the Trends tab, you can **view spending trends over time, filter by account, and adjust time ranges** to better understand your spending.



Debts Tab

Within the Debts tab, you can **track your debt** by connecting your accounts and **plan to pay it off faster**.

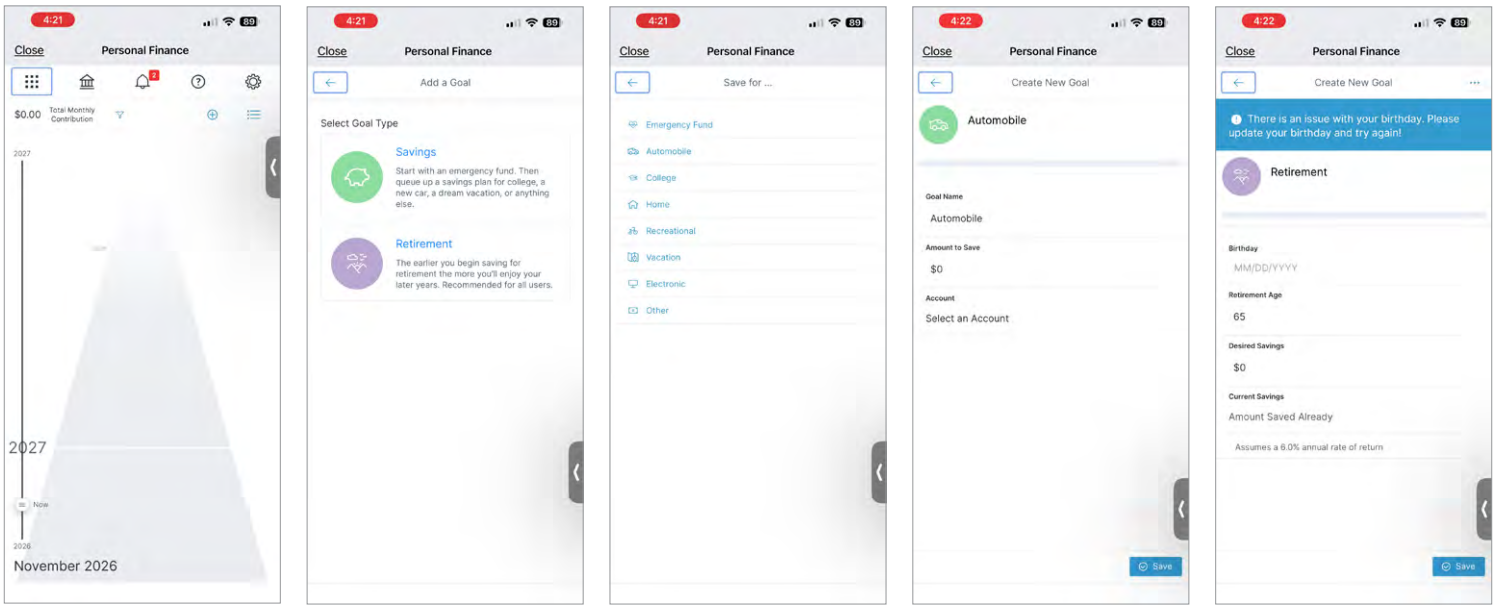




Networth Tab

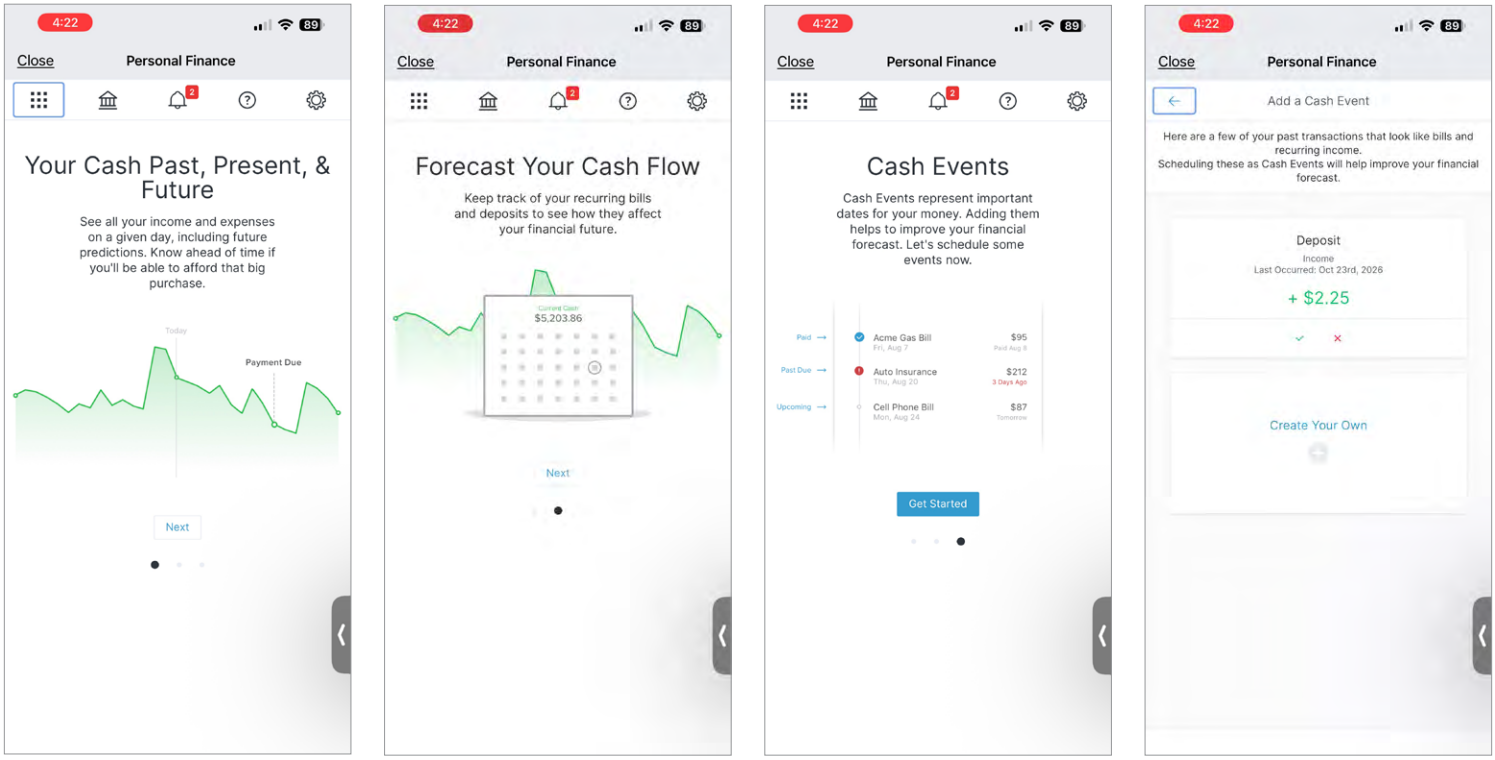
Within the Networth tab you are able to **view networth, assets & liabilities.** You are also able to **filter your spending by account and date.**

Goals Tab



Within the Goals tab, you can **view and prioritize** your financial goals across **three Goal Types**, distributing your contributions to match your priorities. Contributions go toward the **highest-priority goal** in each type and automatically move to the **next goal** once completed. You can also **filter goals by account** or **add new goals manually.**

Cash Flow Tab



Within the Cash Flow tab, you can view your **income and expenses,** including **future predictions**. See whether you can **afford upcoming purchases, track recurring bills and deposits**, and **add Cash Events** to improve your financial forecast and plan ahead.