

# Insights

## How to Add a Goal

Step 1: Navigate to *Insights* and select the *Goals* button on your dashboard or choose the *Goals* tab on the toolbar.

The screenshot shows the Insights dashboard with the 'GOALS' tab selected in the top navigation bar. A blue arrow points to the 'GOALS' tab. Below the navigation bar, there are two main sections: 'Most Recent Activity' and 'Goals Progress'.

**Most Recent Activity (Accounts):**

Account	Balance
American	\$16,784.98
Car Loan	\$21,982.78
401(k) Fidelity	\$89,078.11
Primary Savings	\$1,000.00

**Most Recent Activity (Transactions):**

Tuesday, November 2, 2021

Starbucks	Diningout	-\$6.83
Vonage	Utilities	-\$10.95
Check #125	personal	-\$200.00

**Goals Progress:**

- Custom savings goal: 0% complete, Saved \$0 of \$500,000
- Pay off a credit card: 0% complete, Paid \$0 of \$16,785
- Save for a house: 0% complete

A blue arrow points to the 'VIEW GOALS >' button at the bottom of the Goals Progress section.

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Step 2: Click *Add Goal*.

OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH

CURRENT COMPLETED

Primary Savings Savings \$1,000.00

Custom savings goal  
Saved \$16.00 towards goal of \$500,000.00  
Save \$400.00 monthly to complete on 10/20/2125

Save for a house  
Saved \$84.00 towards goal of \$50,000.00  
Save \$1,960.00 monthly to complete on 11/18/2023

American Card \$16,784.98

Pay off a credit card  
Paid \$0.00 towards goal of \$16,784.98  
Pay \$1,400.00 monthly to complete on 10/20/2022

Types of Goals

There are two types of goals to choose from: Save for Goals and Pay Off Goals.

**Save for Goals** could include saving for a house, car, or college fund.

**Pay Off Goals** could include paying off your credit card debt, short and long term financial goals.

Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals

ADD GOAL

ADD GOAL ALERT

Home ownership can be more than just a dream  
Mortgages

The More You Know: The *Goals* tab also allows you to view and modify existing Goals. You can rename, increase/decrease goal amounts, and even modify the accounts to track by clicking into the appropriate one.

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Step 3: Choose one of our suggested goal-types or click the *Custom Savings Goal* to create one of your own.

The screenshot displays a financial dashboard with a dark blue header containing navigation tabs: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. A search icon and a share icon are also present. A white modal window titled "Choose a Goal" is centered on the screen. It contains the following text: "We often have the same financial goals, whether it's saving for your first house, or paying a student loan. These are the most common goals we recommend you start with, or you can add your own custom goal." Below this text is a grid of 12 goal options, each with a circular icon and a label: "Pay off a credit card", "Pay off loans", "Custom payoff goal", "Save for a baby", "Save for a car", "Save for a college", "Create a savings cushion", "Save for retirement", "Save for a house", "Save for a vacation", "Save for a wedding", and "Custom savings goal".

Below the modal, the dashboard shows a section for "American Card" with a balance of \$16,784.98. A goal card for "Pay off a credit card" is visible, showing "Paid \$0.00 towards goal of \$16,784.98" and "Pay \$1,400.00 monthly to complete on 10/20/2022".

At the bottom, there is a promotional banner for "Home ownership can be more than just a dream" with a "Mortgages" button. To the right of the banner, there are two dark blue buttons: "ADD GOAL" and "ADD GOAL ALERT".

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Step 4: Complete the following fields related to the *Goal* you are establishing. The *This account has [dollar amount]. Start tracking [dollar amount] towards my goal* field allows you to consider a dollar amount of your choosing already available in the account used to monitor your goal. If you would like to begin saving for this goal starting at \$0, enter a zero in the dollar amount field. In the example below, the user's Primary Savings account has a current balance of \$1,000.00. They are choosing to apply \$500.00 of that \$1,000.00 to their *Trip to Hawaii*.

Step 5: Click Save.

The screenshot shows the 'Add Save For Goal' screen in a financial application. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area is titled 'Add Save For Goal' and features a red circular icon with a white star and a green checkmark, representing the goal 'Trip to Hawaii'. Below the goal name, there is a section for 'Accounts' with a dropdown menu currently set to 'Primary Savings'. The 'Amount you want to save \*' is set to '\$ 3,000.00'. A text field indicates 'This account has \$1,000.00. Start tracking \$ 500.00 towards my goal'. Under 'Completion (Choose One)', the 'Monthly Payment' option is selected with a value of '\$ 200.00'. The 'Create an alert for your goal' checkbox is checked. At the bottom, a 'Goal Summary' section states: 'You're saving \$2,500.00 by 12/2/2022 for Trip to Hawaii goal. If you save \$200.00 a month, you will be able to complete your goal in time.' There are 'CANCEL' and 'SAVE' buttons at the bottom right.

Note: Insights does not move money, it is a tool to suggest how to save to reach your goal.