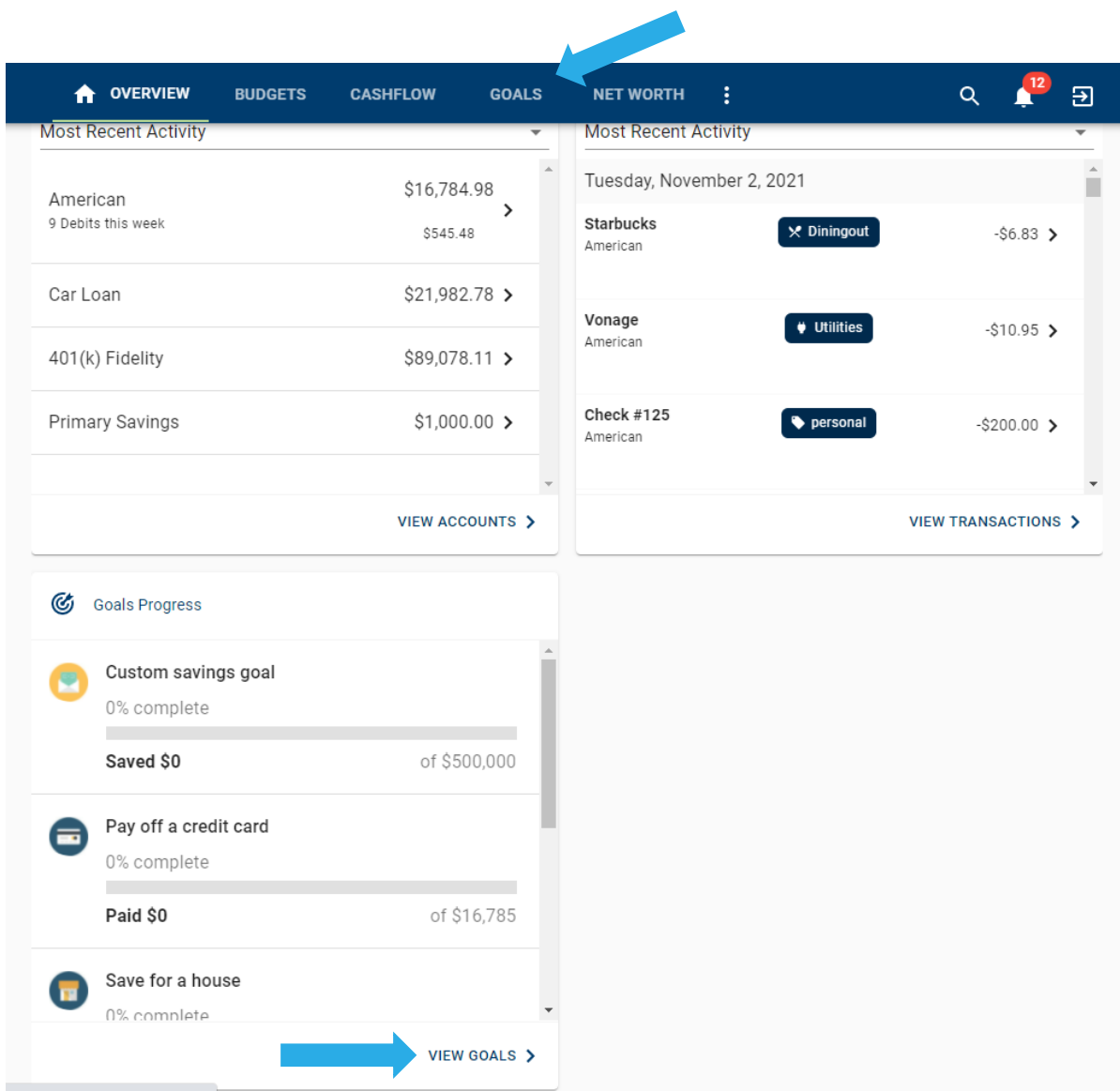


## How to Add a Goal

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



## 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.

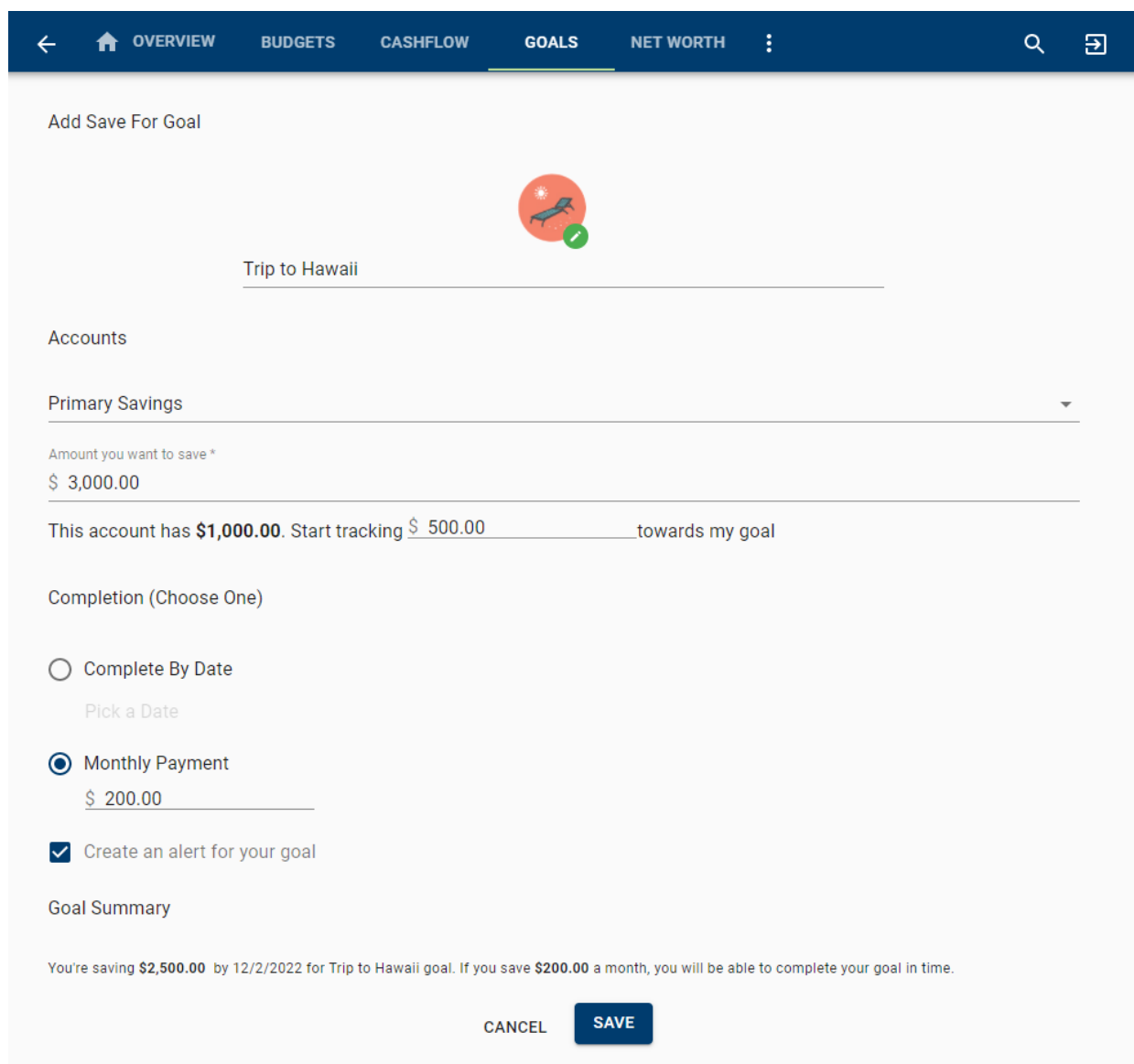
**Step 3:** Choose one of our suggested goal-types or click the *Custom Savings Goal* to create one of your own.

The image shows a financial dashboard with a dark blue header containing navigation tabs: OVERVIEW, BUDGETS, CASH FLOW, GOALS, and NET WORTH. A white modal window titled "Choose a Goal" is centered on the screen. The modal 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 3x4 grid of goal icons with labels: "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 "Primary Savings" section with a card for "Pay off a credit card" with a balance of \$16,784.98 and a monthly payment of \$1,400.00. A banner for "Home ownership can be more than just a dream" is visible at the bottom left. On the right side, there is a section titled "Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals" with two buttons: "ADD GOAL" and "ADD GOAL ALERT".


**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.



← **OVERVIEW** BUDGETS CASHFLOW **GOALS** NET WORTH 🔍 🏠

Add Save For Goal



Trip to Hawaii

Accounts

Primary Savings ▾

Amount you want to save \*

\$ 3,000.00

This account has **\$1,000.00**. Start tracking \$ 500.00 towards my goal

Completion (Choose One)

Complete By Date

Pick a Date

Monthly Payment

\$ 200.00

Create an alert for your goal

Goal Summary

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.

CANCEL **SAVE**

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