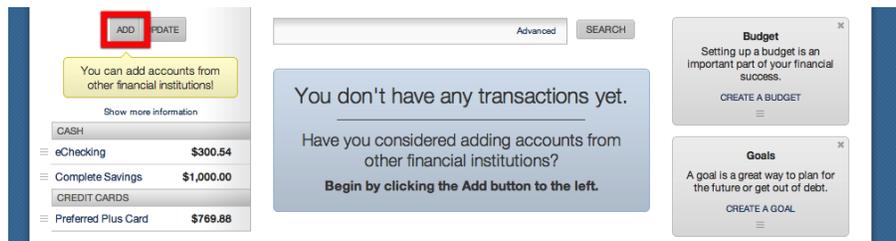


PFM Quick Start

Dashboard

1. Add accounts from other financial institutions.

NOTE: Your primary accounts will already be added to this service.



The screenshot displays the PFM dashboard interface. On the left, there is a sidebar with an 'ADD' button highlighted in a red box. Below it, a yellow callout box states 'You can add accounts from other financial institutions!' with a 'Show more information' link. The main content area features a central blue message box: 'You don't have any transactions yet. Have you considered adding accounts from other financial institutions? Begin by clicking the Add button to the left.' To the right, there are two widget boxes: 'Budget' with a 'CREATE A BUDGET' button and 'Goals' with a 'CREATE A GOAL' button. At the top, there are 'Advanced' and 'SEARCH' buttons. The left sidebar also contains a table of account balances:

CASH	
eChecking	\$300.54
Complete Savings	\$1,000.00

CREDIT CARDS	
Preferred Plus Card	\$769.88

2. When you add accounts, your transactions and balances will update accordingly.
3. Your transactions will categorize themselves. To personalize these categories, select the transaction and edit the "Tag".

Cashflow

Friday, November 30, 2012		Export
Payment Auto Advantage Loan	Split Show split	+ 100.00
GameStop Corporation Complete Savings	Video Games	- 59.99
AT&T American Express	Bills	- 83.90
Bed Bath & Beyond Ultimate Checking	Household	- 6.20

FIRST STEPS Add income and bills like your paycheck, rent or utilities to see your monthly cashflow.

1. Follow the prompt at the top of the screen to predict your cash flow.



2. Add Incomes & Bills to accurately forecast your daily cash flow.

Budget

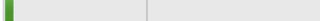
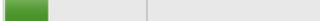
NEXT STEPS Set spending targets on frequent purchases to create a monthly budget.

1. Follow the next prompt to begin budgeting.
2. Complete the addition form to see your budget progress for the current month.

◀ NOV December 2012 Budget



ADD A NEW SPENDING TARGET

Entertainment Spend	YOU'VE SPENT \$7 OF \$200 	\$193 LEFT TO SPEND
Food Spend	YOU'VE SPENT \$56 OF \$400 	\$344 LEFT TO SPEND
Household Spend	YOU'VE SPENT \$69 OF \$300 	\$231 LEFT TO SPEND

Goals

1. Follow the last prompt to create financial goals.

LAST STEPS You can create long-term goals like saving for a car or paying off a loan.

2. Select and create one of the following goal types to begin tracking your savings progress.



Congratulations!
You've completed the Quick Start Set Up.
Continue to explore and monitor your finances!