

Finance Manager

An additional feature of **Online Banking** with all the features you need to help *manage your money!*

- **Create Spending Targets** that allow you to create budgets based on the 'tags' that are important to you.
- **See your projected day-to-day cashflow.**
- **Add Income and Bills** like your paycheck, rent or utilities to more accurately forecast your cash flow.
- **Create one or more financial goals.** Select from the savings or payoff goal types to begin tracking your progress toward your financial aspirations.
- **See your net worth.** It's automatically calculated daily based on the accounts you've added.
- **Customize Your Dashboard**
 - Add, edit, delete accounts from other financial institutions. Your primary accounts with Providence Bank will automatically be added!
 - When you add accounts, your transactions and balances will update automatically.
 - Your transactions will automatically be categorized with 'tags'. You can also personalize the tags if you want to categorize the transaction differently.
- **Create customized alerts** for Account Balance, Spending Targets, Goal Progress, Bill Reminders, Large Transactions and Merchant Name.
- **See alerts** at the top of the Dashboard, or opt in to receive text or email alerts.



View and manage **ALL** of your Financial Accounts in **One Place**. Providence Bank accounts and accounts at other financial institutions!

Ready to get started?

It's *Easy* to access **Finance Manager!**

Just log in to your **Online banking** and click on **Finance Manager**.

Questions?

Simply click on **Help** and then **Frequently Asked Questions**.

Specific questions?

No problem. Click on **Help** and submit a **Support Request**.