

# PFM Benefit Statements

Quickly view your investment and mortgage balances as well as credit card and bank account balances and transactions in one place, regardless of where you have the accounts. You can add any account you can access online and gain an easy and fast way to watch “the big picture”.

Adding other accounts for a complete financial picture is simple. PFM NAME will then track your account relationships with almost all financial institutions automatically, including credit card providers and investment firms. Then use PFM NAME to track spending, set budgets, calculate your net worth and more.

Easily create budgets, categorize and track spending habits. Quickly create a budget and start tagging your transactions to see where and how you spend your money. By seeing how you reach a spending target you can make smarter choices about how you spend.

The cash flow calendar brings your budget to life through an interactive calendar. With the calendar, you can see how much money you have available to pay bills and other expenses day by day...allowing you to make informed choices on when to schedule bills and other spending.

Set and track goals. Visually tracking your progress can help you take control and make reaching your financial goals much quicker and easier. Use PFM NAME to create savings goals, like saving for a vacation, or a debt reduction goal, like paying off a high rate credit card. The goals tool asks for a date by which you want to accomplish the goal and keeps track of your progress automatically.

Stay informed with account alerts by email or text. With PFM NAME, you really are in control. Be alerted when an account balance changes significantly, transactions to a specific retailer occur, when you are close to exceeding a spending category, and more. No more need to login to home banking constantly to track activity...let PFM NAME keep you informed.

Build wealth and watch it grow through the Net Worth tool. No need to keep manually updating a spreadsheet. PFM NAME helps you quickly add up all your assets (you can even add your home and vehicles) and debts to show you an up-to-date estimate of your net worth.