

GET STARTED GUIDE

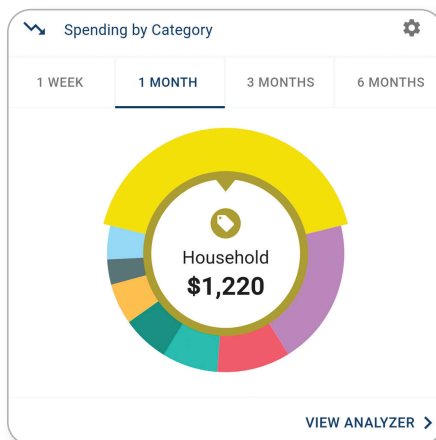
Now there's a smarter way to manage your money

Build a budget, stay on track and plan for the future with Snapshot



Introducing Snapshot — a more intuitive digital banking tool

It's easier than ever to get insights into your finances with [PFM Name]. You can build personal budgets, manage your cash flow and set goals for the future — all in one intuitive interface. It's one more way Taylor Bank helps you achieve your financial goals.



See your spending on the dashboard

The dashboard displays your top spending category each month.

- Step 1:** Click different parts of the wheel to see your spending breakdown. Transactions are sorted automatically into these categories with 'tags.'
- Step 2:** To personalize your categories, or split the transaction between tags, click on a transaction and edit the tag.
- Step 3:** When you select a transaction from the dashboard you can also change the name of the transaction, create a budget or add a recurring transaction to your Cashflow Calendar.

New Budget

1 Choose which tags to track

Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.

| | |
|--|---|
| <input type="checkbox"/> Appliances \$0 | <input type="checkbox"/> Auto \$0 |
| <input type="checkbox"/> Auto Expense \$0 | <input type="checkbox"/> Baby Expenses \$0 |

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NEXT

2 Choose the name & amount

3 Choose accounts

Set spending targets

Snapshot gives you valuable insights based on your spending habits. These insights will help you build a more accurate budget.

- Step 1:** Navigate to Budgets Progress Tile.
- Step 2:** Click "View Budget."
- Step 3:** Click "Add Budget."
- Step 4:** Personalize your spending target by adding the monthly amount and item name (for example: "Baby Expenses"). Choose the purchase category tags you want to include in this budget.

