

Goals

Create savings goals, like saving for a vacation, or a debt reduction goal, like paying off a high-rate credit card.

Step 1: Navigate to Goals, and select "Add Goal."

Step 2: Select your desired pay off or savings goal.

Step 3: Fill in the required information.

Step 4: Click "Save" to complete the process of adding a new goal.

Keep in mind, your Goal Summary will update your completion date and the amount needed per month according to your preferences. Goals will automatically update your progress and will reflect your day-to-day account balances in PFM.

Add an Account

Syncing other accounts for a complete financial picture is simple.

Step 1: Navigate to Accounts, and click the plus sign to "Add Linked Account."

Step 2: Select an institution or use the search to find your institution.

Step 3: Enter in the required information and select "Connect."

You'll receive a notification on your PFM dashboard once the account has been synced successfully.

Questions?

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