

Best Practices for Using Your PFM Site

Your personal financial management (PFM) site offers a real-time, 24/7 view into your complete financial picture. As you are getting set up on your PFM, follow these tips to help you get the most out of this resource.

HOME SCREEN

Here you'll see a holistic picture of your financial health at a glance. The tiles on this page offer a snapshot into each section of the site, which you can drill down into for more information.

ORGANIZER

Consolidate all your important financial information in one place. Start by connecting your financial institutions in the "Accounts" section of the Organizer in order to get an updated view into your accounts and investments in real-time. Next, add in your goals and financial priorities and personalize your site by adding photos and important milestones.

GOALS

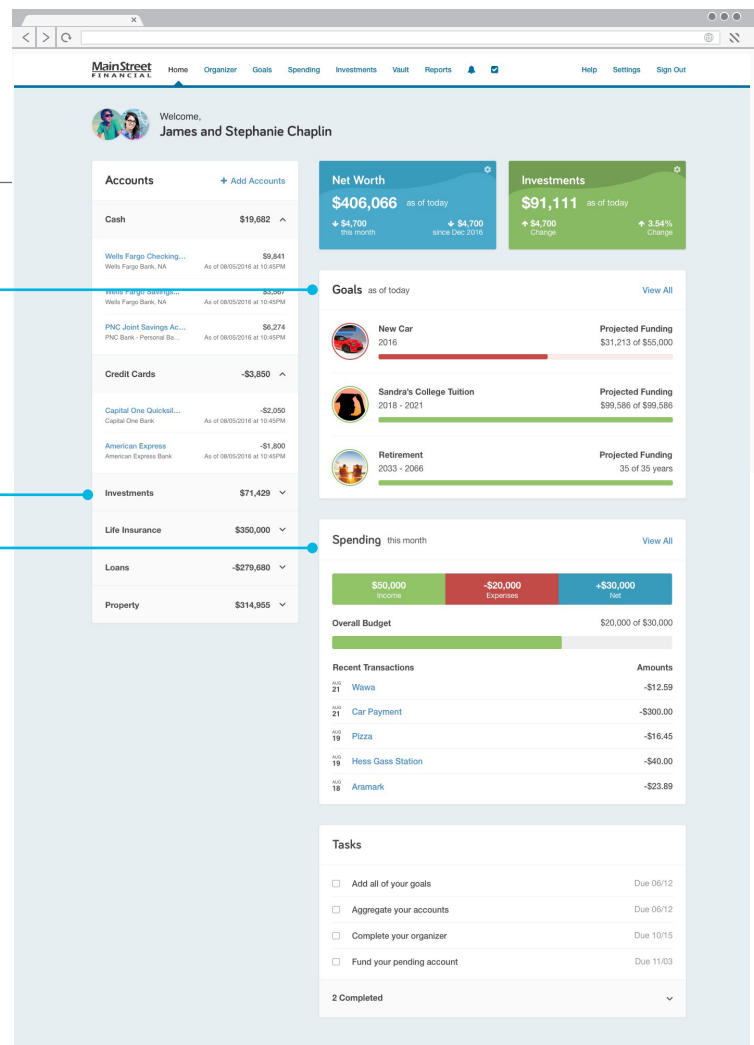
Easily add goals, track your progress toward funding those goals, and visualize how your goals impact your long-term financial outlook.

SPENDING

Access the Spending tab to see where your money is going each month, establish a budget to manage your expenses, and make adjustments based on actual spending, saving and investment data.

INVESTMENTS

Monitor your investment performance and asset allocation. Make sure to first connect all your investment accounts so you can get an accurate picture of your finances.



VAULT

Upload your important documents for safe keeping and easy access when you need them. Protected by the highest level of encryption in the industry, private folders provide a secure location to store sensitive files, while shared folders enable you and your advisor to easily share and access important documents for review.