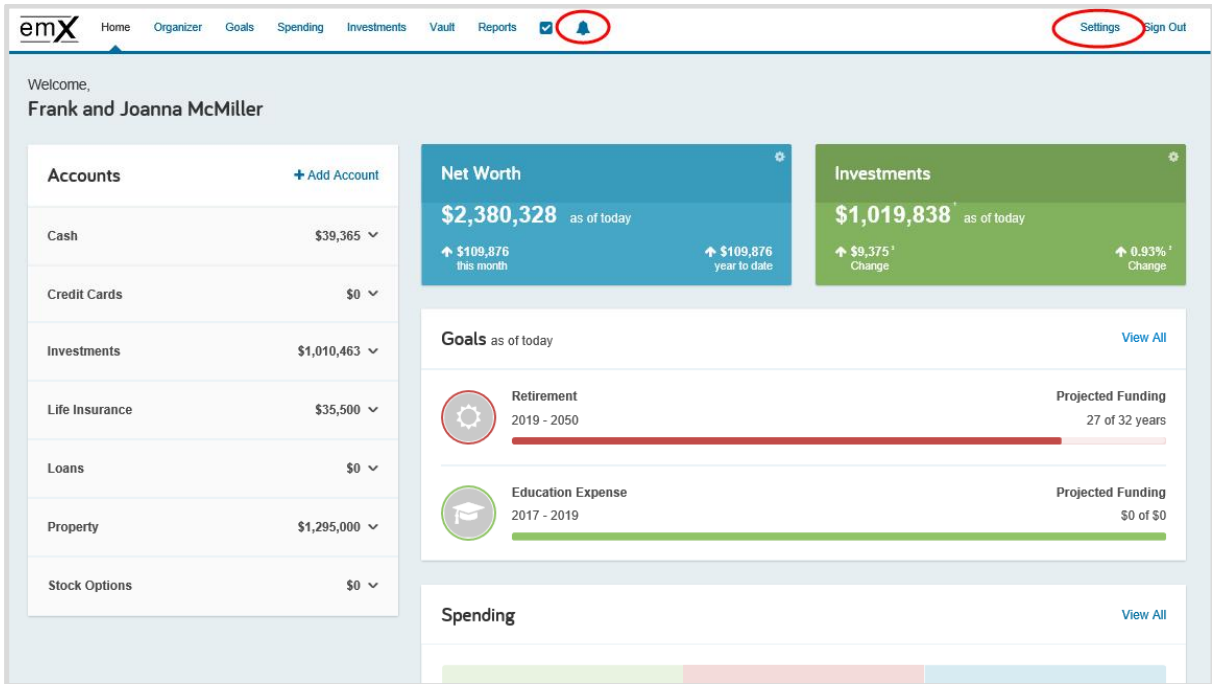


Alerts

This training guide demonstrates how to set up alerts around the information and financials entered in to your personal financial management site!

Please Note: Your advisor has the ability to customize which alerts are available to you on your website.

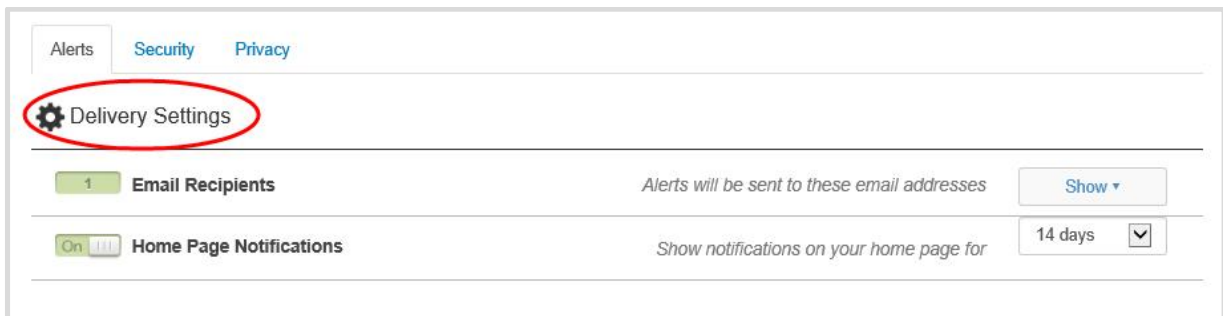
1. From your Home page, click **Settings** or the **Bell** icon.



2. The Delivery Settings allow you to permission alerts being sent to an email and if you want to be notified on your home page that an alert has been triggered.


To add an email recipient, click the **Add/Show** drop down and enter in the recipients email. Click the Plus sign when complete.

toggling **ON** Home Page Notifications allows you to see triggered alerts for a set number of days before they expire.




Alerts

3. Personal Financial Alerts allow you to set up notifications for things relevant to your financials – these alerts are tied to the spending information brought over through Accounts. To add accounts directly from a financial institution, please refer to the Adding Accounts user guide.

 Personal Finance

<input type="checkbox"/> Off	Weekly Financial Summary	A periodic overview of your finances (email only)
<input type="checkbox"/> Off	Low Cash Balance	When the balance of any cash account falls below - \$500 +
<input type="checkbox"/> Off	High Credit Balance	When the balance of any credit card rises above - \$2,500 +
<input type="checkbox"/> Off	Large Expenses	When any expense occurs that is larger than - \$1,000 +
<input type="checkbox"/> Off	Large Deposits	When any deposit occurs that is larger than - \$1,000 +
<input type="checkbox"/> Off	Bank Fees	When any bank fee occurs that is greater than - \$1 +
<input type="checkbox"/> Off	Budget Exceeded	When your spending exceeds any of your budgets
<input type="checkbox"/> Off	FICA Maximum Approaching	When you're nearing your FICA max withholding for the year

4. Investments alerts are relating to the underlying investment holdings in your portfolio.

 Investments

<input type="checkbox"/> Off	Investment Activity	When specific types of investment transactions occur
<input type="checkbox"/> Off	Unbalanced Portfolio	When your investment portfolio is out of balance by more than : - 10% +
<input type="checkbox"/> Off	Concentrated Position	When a stock or bond makes up more than this much of your portfolio: - 40% +
<input type="checkbox"/> Off	Excess Cash Position	When cash makes up more than this much of your portfolio: - 33% +
<input type="checkbox"/> Off	Security Prices	Monitor the prices of stocks and mutual funds Add ▾

Alerts

5. Reminders are date based alerts.

Reminder	Description	Frequency	Age
<input type="checkbox"/> Off End of Year Planning	Annual financial housekeeping tips		
<input type="checkbox"/> Off Insurance Policy Anniversary	Annual reminder of policy renewal date		
<input type="checkbox"/> Off Tax Filing Dates	When tax filing dates are approaching	Annually	
<input type="checkbox"/> Off Frank's Social Security Benefits	When Frank is approaching age		62
<input type="checkbox"/> Off Joanna's Social Security Benefits	When Joanna is approaching age		62
<input type="checkbox"/> Off Required Minimum Distributions	Annual reminder to meet your RMD requirements		
<input type="checkbox"/> Off Important Dates	Birthdays, anniversaries, or any other date you want to remember		

6. Triggered alerts will appear as notifications from your Alerts icon!

Home Organizer Goals Spending Investments Vault Reports **Alerts**

ALERTS Manage

REMINDER August 23 - Annual Review Aug 22