

Goal Builder

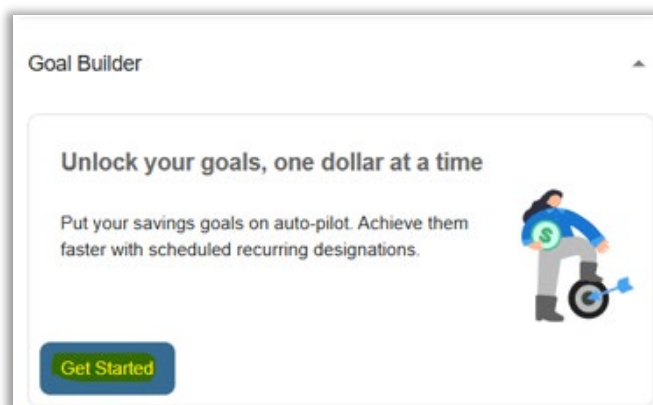
Overview

The Goal Builder tool serves as a virtual coffee can system, allowing customers to remove the “mental accounting” of what can be used or what needs to be saved for whatever goals are set up. When using Goal Builder, a customer will have one account driving all their goals and can set up goals according to their priorities and see their remaining balance after accounting for their savings goals.

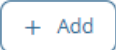
Goals are created individually, thus enabling the customer to determine how much to designate and how frequently through a “set it & forget it” rule to drive them towards achieving their savings goals.

Enrolling into Goal Builder

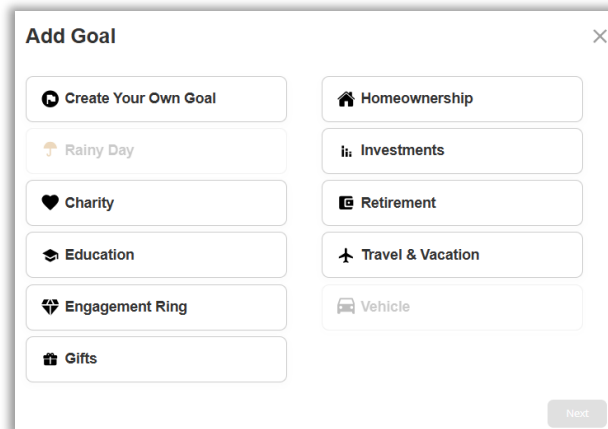
1. On the right side of the main menu, in the Widget Stack, select **Goal Builder**.
2. Link an account that will encompass all of your goals.
3. Click “**Get Started**” to create a goal.



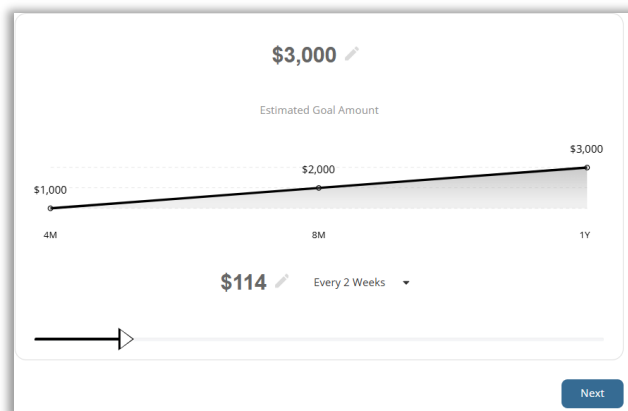
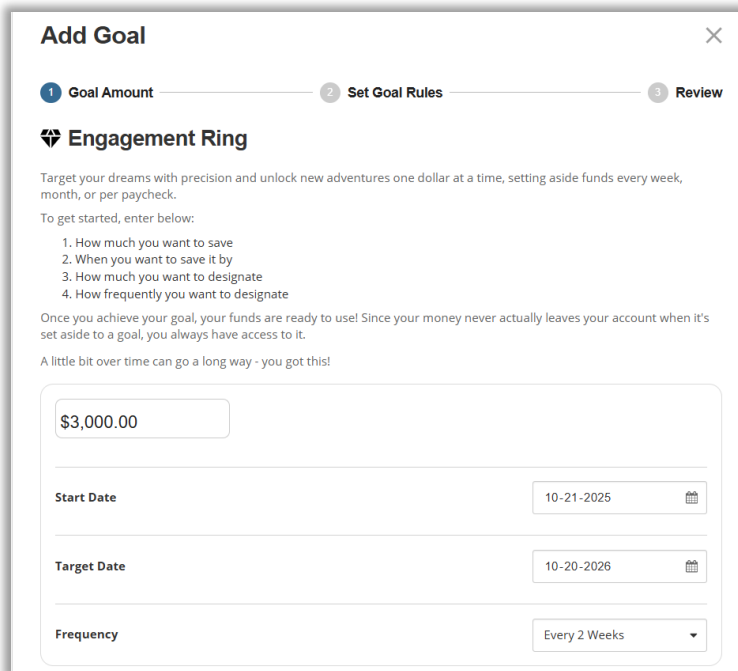
Creating a Goal

1. Click on “**Get Started**”. At the top of the page, click  to create a goal.
2. Select the type of category you would like to create a goal for.

Note: Categories that are grayed out are unavailable and cannot be selected. You can only have one active goal per category.



3. Follow the prompts such as goal amount, start date, completion date, frequency, etc.



- Once a goal is created, you can adjust rules and see any potential impacts to the timeline.

Add Goal [Close]

1 Goal Amount | **2 Set Goal Rules** | 3 Review

Engagement Ring

Goal Amount	\$3,000.00
Start Date	October 21st, 2025
Target Date	November 2nd, 2026

Determine the best goal rule to keep you on track. Designate funds within your account based on a schedule you choose, or as a percentage of every deposit into your linked account.

Scheduled, recurring designations[®]

Percentage of each account deposit[®]

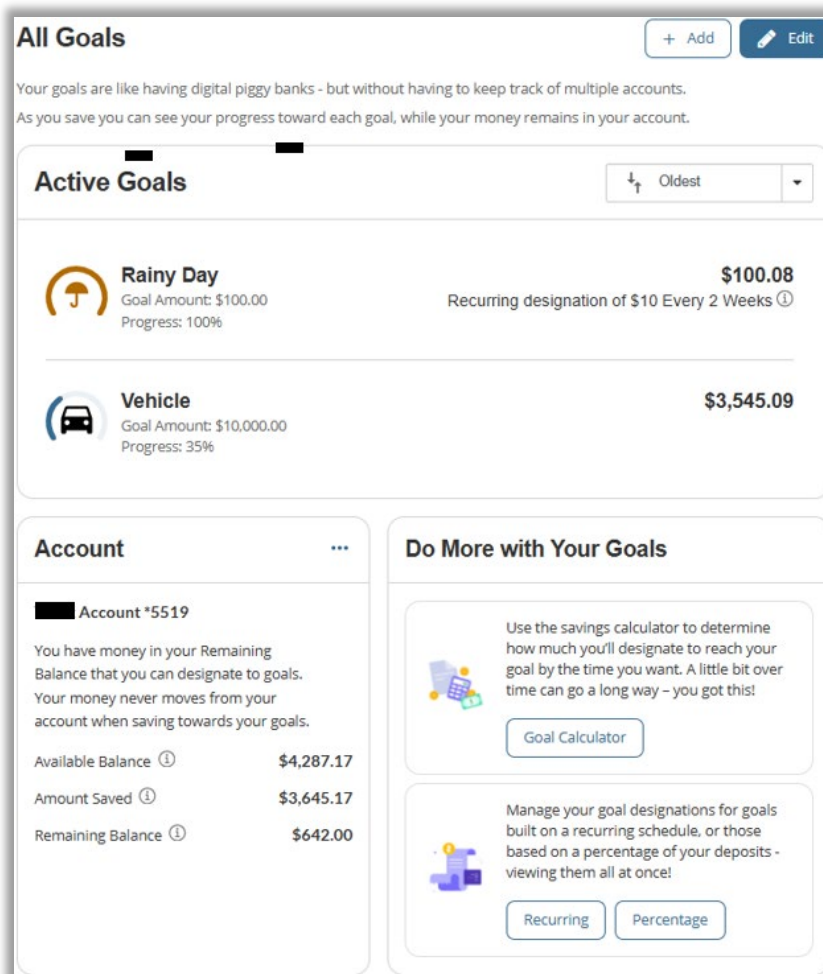
From:

Frequency of designated amount:

On:

Until:

- After following the prompts, on the final step, you will review the target amount and the ongoing rule used to reach the goal. Click **Confirm**. You will then be directed to the “**All Goals**” landing page:



- From the “All Goals” page, you can view all active, complete, or inactive goals. You can also **edit** the goal’s target date, amount and/or frequency.

Things to Know

Goal Builder is a virtual coffee can system. No funds are actually being held or moved out of the selected funding account. Goal Builder simply is a visual representation of the savings you have accumulated, allowing you to manage different savings goals within the same account.

- By keeping funds in the same account, you can take advantage of a higher overall balance and more interest earnings.

Goal Builder does not connect automatically to set up transfers into your selected funding account. Please utilize either external or internal transfers to set up a recurring transfer to move funds to help meet your goals.