

HOW 2 SERIES

HOW TO MANAGE YOUR MONEY

Sign up for Personal Finance in Online & Mobile Banking

Sign up via Online Banking on our Website

1. Sign up for and login to Online Banking on our website
2. Click the **Tools** tab and select **Personal Finance**
3. Follow the prompts to enroll
4. Begin adding accounts from other financial institutions, set up budgets, and more.

Sign up via our Mobile Banking app

1. To use Personal Finance in our Mobile app, you first need to enroll via Online Banking on our website
2. To access Personal Finance in the app, click on **More** at the bottom of the screen and **Personal Finance**
3. Begin adding accounts from other financial institutions, set up budgets, and more

What Can You Use Personal Finance For?

- See all your financial accounts in one place
- Create and manage budgets
- Understand your spending
- Set and keep track of goals
- Know your net worth
- Get notifications and reminders

Need More Help From An Expert?

Give us a call during business hours at 781.329.6700 or 800.462.1190



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