

# How to Add Goals in Insights

We often have the same financial goals, whether it's saving for a first house, or paying a student loan. Digital Banking provides the availability to set those goals.

## 01 Navigate to Insights

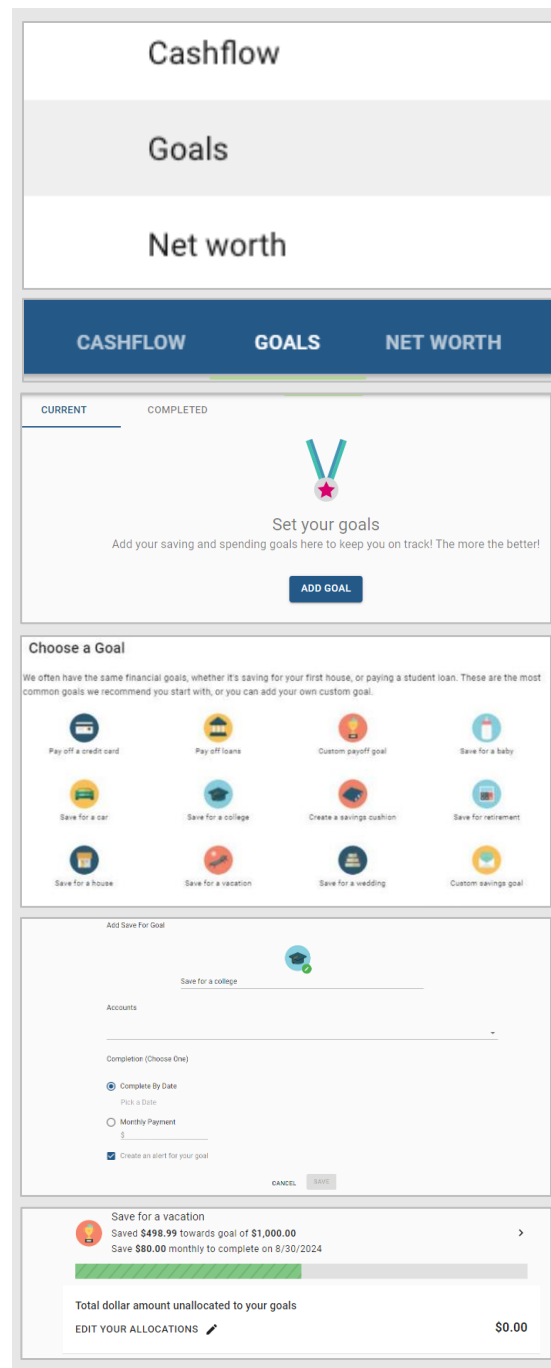
- On the main dashboard, you will have two options to access **Goals**
  - From the left navigation menu, click the **Insights** dropdown and select **Goals**
  - From your main dashboard, select the account you want to create a budget for and click the **Insights** tile. From the Insights dashboard top menu, click **Goals**

## 02 Add a New Goal

- In the Goals dashboard, click Add **Goal**
- Click a suggested Goal or click the **Custom Saving Goal** to create one of your own
- Complete the following fields for the related Goal that is being established:
  - Account(s)
  - Amount you want to save
  - Completion (Choose a Completed by Date)
  - Optional: Create an alert for your goal
- Click **Save**

## 03 Manage an Existing Goal

- To make updates or to delete an existing Goal, click the Actual Goal
- You will be able to update:
  - Amount you want to save
  - Complete By Date
- Click **Save**
- If the **Account** needs to be updated, click **Delete**
- Refer to Step 2 to set a New Goal with the Account change



**Cashflow**

**Goals**

**Net worth**

**CASHFLOW GOALS NET WORTH**

**CURRENT COMPLETED**

**Set your goals**  
Add your saving and spending goals here to keep you on track! The more the better!

**ADD GOAL**

**Choose a Goal**  
We often have the same financial goals, whether it's saving for your first house, or paying a student loan. These are the most common goals we recommend you start with, or you can add your own custom goal.

Pay off a credit card Pay off loans Custom payoff goal Save for a baby  
Save for a car Save for a college Create a savings cushion Save for retirement  
Save for a house Save for a vacation Save for a wedding Custom savings goal

**Add Save for Goal**

Save for a college

Accounts

Completion (Choose One)

☒ Complete By Date  
Pick a Date

☐ Monthly Payment  
\$

☒ Create an alert for your goal

**CANCEL SAVE**

**Save for a vacation**  
Saved **\$498.99** towards goal of **\$1,000.00**  
Save **\$80.00** monthly to complete on 8/30/2024

Total dollar amount unallocated to your goals  
**EDIT YOUR ALLOCATIONS** **\$0.00**