FINANCIAL TOOLS QUICK START GUIDE

Manage your money anywhere.

Northeast CREDIT UNION

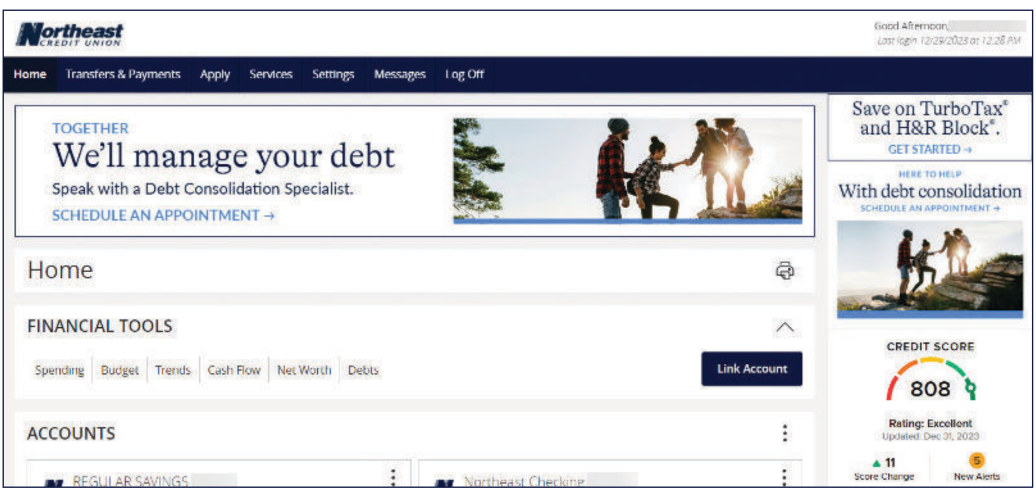
FINANCIAL TOOLS

Manage Your Money Anywhere

Our Financial Tools deliver a fully integrated financial picture to help create and monitor budgets and manage debt right from the palm of your hand.

Set up is simple!

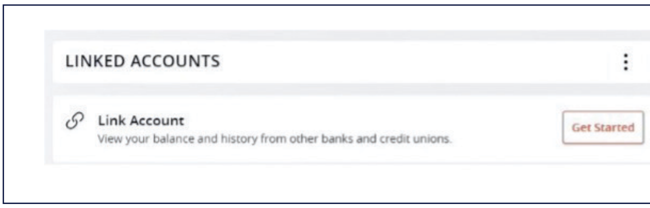
1. Login to Digital Banking on your desktop or your Northeast Credit Union mobile app.
2. Select **"Get Started"** under the Financial Tools box towards the top of the screen.
3. A welcome screen will display, click **"Continue".**
4. Review and accept the Terms & Conditions.
5. Select **"Get Started".**

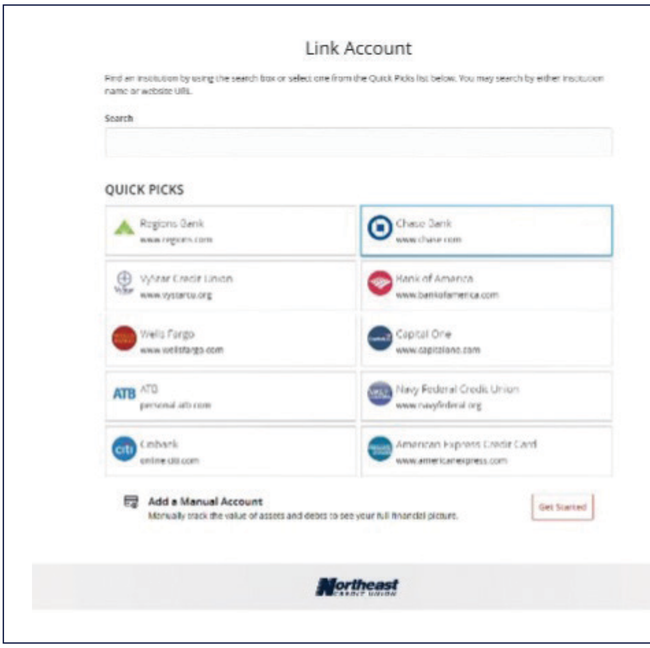


Connect Your Other Accounts

Link accounts from other financial institutions. You can add non-Northeast accounts including checking, savings, money markets, wealth management accounts and credit cards so you can have a full-financial picture.

1. Log into Digital Banking on your desktop or open your Northeast Credit Union Mobile App.
2. Select **“Link Accounts”** in the Financial Tools Box.
3. Select the Financial Institution of the account you want to link. If you don’t see your financial institution in the list, you can manually add the Account by selecting **“Get Started”** at the bottom of the page.
4. Enter the credentials of the financial institution’s digital banking account.
5. Follow the prompts.
   And that’s it.





Please note that some financial institutions require further verification and approval so please reach out to the financial institution directly for more information or assistance.

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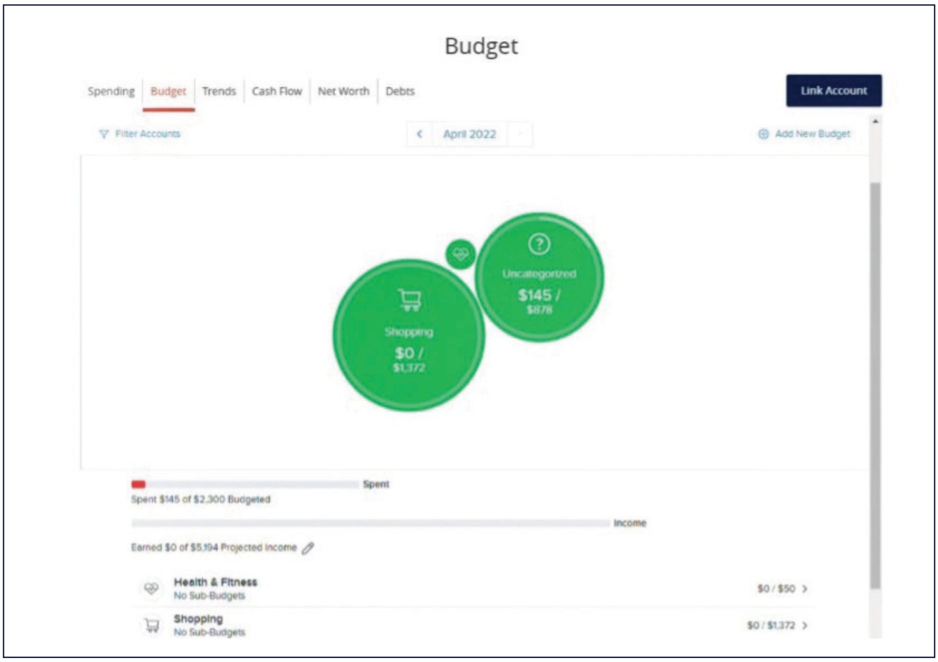
Create a Budget

1. To start creating a budget, select Financial Tools and select **"Budget"**.
2. You can choose to **"Start from Scratch"** or **"Auto-Generate Budgets"**.
3. If you chose to **"Start from Scratch"**, a screen will pop up with a list of categories. Select the + on the right of the budgets you want to add along with the amount you want to budget each month for that category.
4. If you chose to **"Auto-Generate Budgets"**, a budget will generate based on your current spending habits. You can add any missing budgets by selecting **"Add New Budget"** on the top right or edit the auto-generate budgets by clicking on the category on the bottom and selecting **"Edit Budget"**.

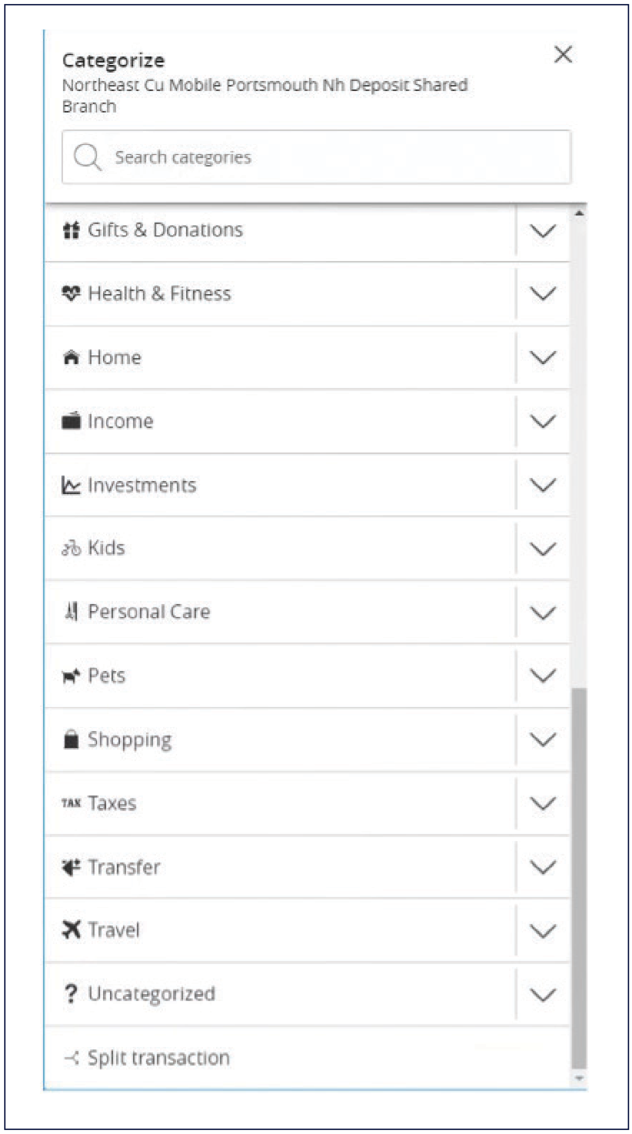


Categorize Your Spending

Make managing your budget easier by categorizing your spending.

Our Digital Banking tool will automatically categorize your spending based on the vendor or type of transaction, but you can always make changes if it's not exactly how you'd categorize it.

1. To add or update a categorization for a transaction or vendor, head to your account view by clicking on the account from the homepage.
2. Find the transaction you want to update, and select the 3 dots on the right side of the transaction.
3. Select **"Change Category"**.
4. Select the category you'd like for the transaction from the list or even split the transaction between multiple categories.



And that's it!

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