

GET STARTED GUIDE

Goal Builder



Keep your savings goals on track.

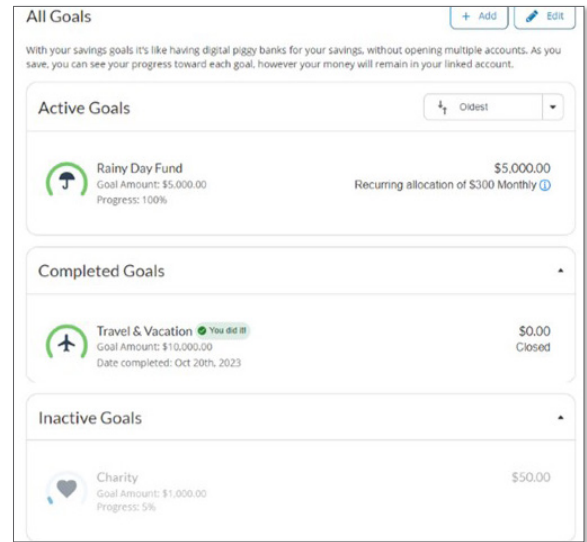
Saving toward your financial goals can be challenging. Let us help you get there.

Goal Builder helps you reach your savings goals by virtually setting aside dollars within one account towards those goals.

NOTE: You will need to be registered for Online or Mobile Banking in order to use Goal Builder. See the "GET STARTED GUIDE: Online Banking" for details on registering for Online Banking in just a few quick steps.

How does it work?

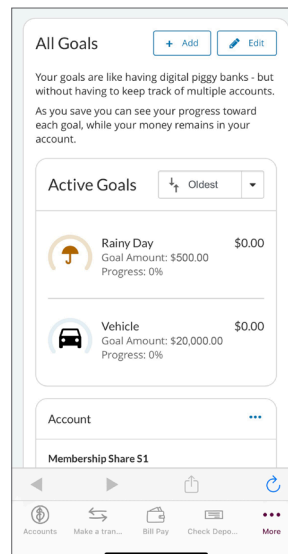
1. To enroll, log in to online or mobile banking and select "Get Started" under the Goal Builder tool.
2. Then select the account you'd like to fund your goal, only one account can be used.
3. On the Goal Builder page, you can set up your goals by selecting from the 10 pre-set categories or create your own.
4. Then customize your goal settings, such as name of the goal, goal amount, start and target dates, and frequency of the fund allocation.
5. Next choose allocation type and dollar amount, and confirm your goal.
6. Ta-da! You've just created your first savings goal. You can always go back to edit and manage your goals under the Goal Builder page.



Goal Builder overview in Online Banking.

Mobile App Take Forrit on the go

Connect with us via our Mobile Banking App, available for your iPhone, iPad, and Android devices - we are available anywhere you are.



Goal Builder is available on mobile app!

Access Goal Builder by selecting "More" or the hamburger menu on the mobile app.

FAQ

Goal Builder



Does the money move from my account?

Money that is moved between goals or designated from the main account does not transfer. All goals are contained within one account – the main funding account.

Think of it like the mental math you do when looking at your checking or savings account. You have a lot of intended uses for that money, but you don't necessarily see it. Goal Builder takes the mental load from you and puts it on paper – and even better, in front of you when you're looking at your bank account.

If you need more money in the main funding account to fund your goals, you will need to manually transfer funds into the account.

I've completed my goal, now what?

Completing a goal is a big accomplishment! The Completed Goals section provides a view of the goals that the user has achieved through designating funds to meet their target goal. The Rainy Day goal never appears in the completed goals section; it always remains at the top of the Active Goals section.

Visualizations of the goal progress show the percentage bar is full and has turned green. Blue is the default color of the percentage bar before the goal is completed.

Which accounts should be shown as available funding accounts?

Goal Builder will present all savings, checking, and money market accounts.

Why is Rainy Day different than other goals?

You never know when an emergency will hit – a flat tire, an unexpected bill, or even a gift you forgot to buy. The Rainy Day goal is so users have designated money as a buffer to use when they're not expecting something – big or small.

As you set aside money, you will also dip into it. To make sure you have enough ready to use, your Rainy Day Fund scheduled designations will continue even once you've reached your target goal. And since your money never actually leaves your account when it's set aside for a goal, you always have access to it.