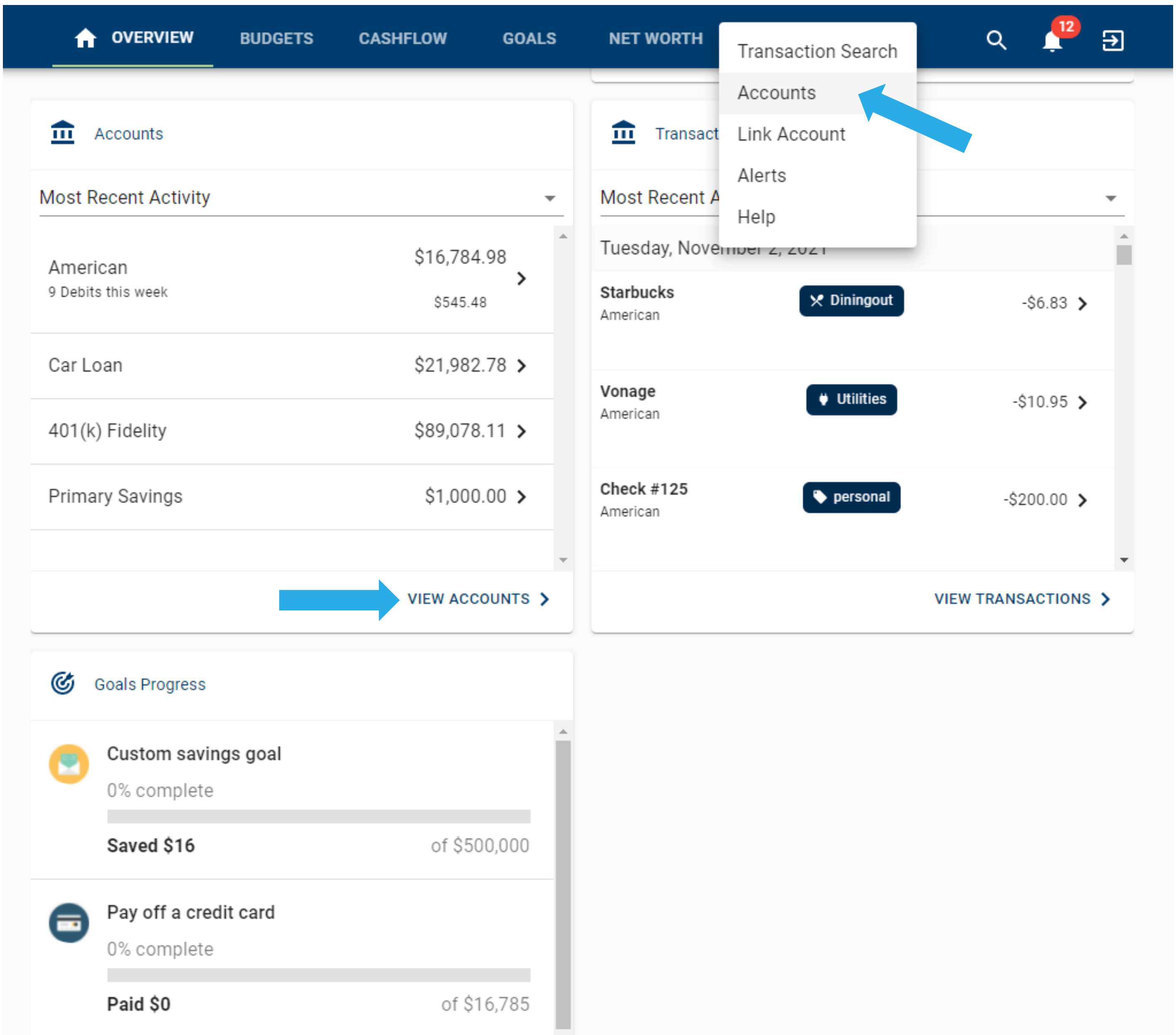
Geezeo

Personal Financial Management

How to Add Accounts to be Viewable in PFM

Step 1: Navigate to *PFM* and select the *View Accounts* button on your dashboard; or choose the ellipsis on the toolbar to select *Accounts*.



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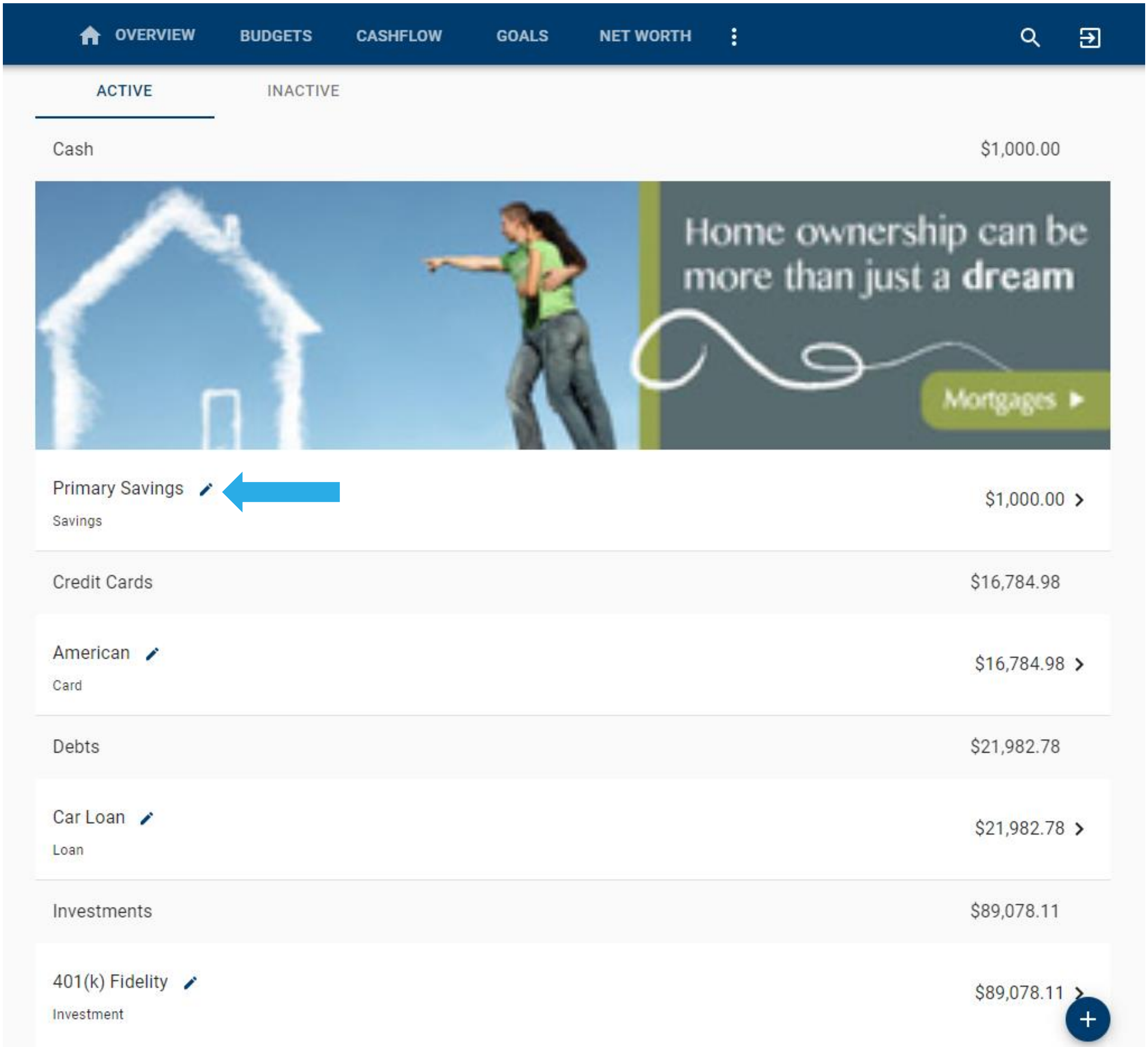
Step 2: Click the *Edit* pen/pencil button next to the account you are wanting to work with.



The More You Know: Our *PFM* feature allows you to aggregate in external accounts from outside of our Financial Institution in order to provide you with a full financial picture. Navigate to the *External Accounts* tab or choose the *Plus* icon in the bottom right of the above screen to begin linking.

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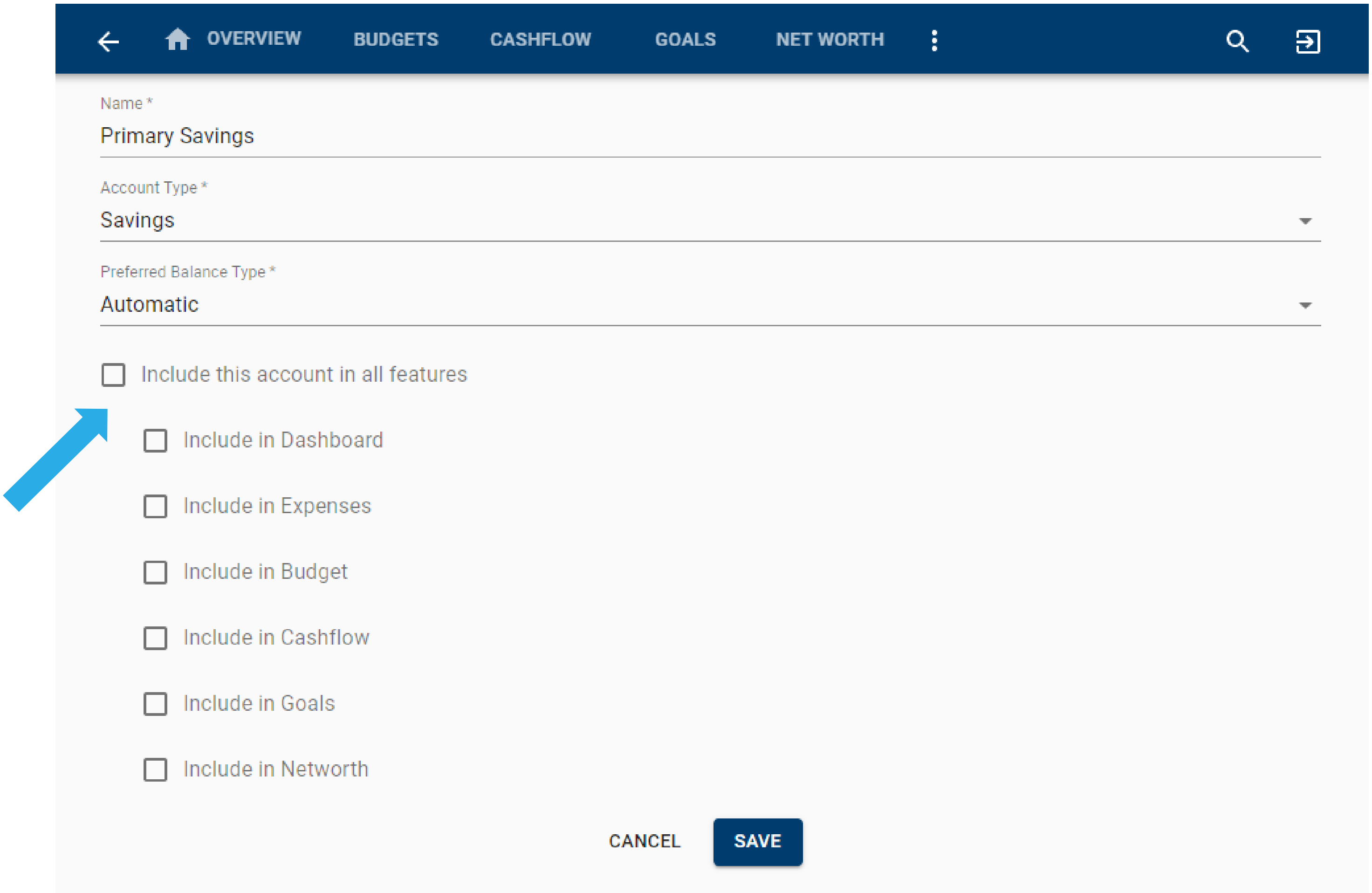
Step 3: Complete the following fields – use the checkboxes to choose which PFM features to include this account in.



Step 4: Click Save.