

# Personal Finance Manager Update

It is our commitment to provide industry leading technology that brings convenience and security to our customers banking experience. We are always seeking to update and improve our resources to ensure satisfaction.

## Personal Finance Manager

### RENEWED LOOK + IMPROVED FINANCIAL TOOLS = BETTER BUDGETING

On March 15, a Personal Finance Manager update will present an enriched appearance, improve current tools, and add new features to help set and reach your financial goals! Now you can easily build a budget, track expenses, and monitor your financial picture.

### UPDATED LOOK

A new look brings a fresh appearance and an improved menu for better access to the tools. The left navigation menu has been moved to the top navigation bar for easier access to all of the same useful links.

Here is a familiar page to current users with the updated look:



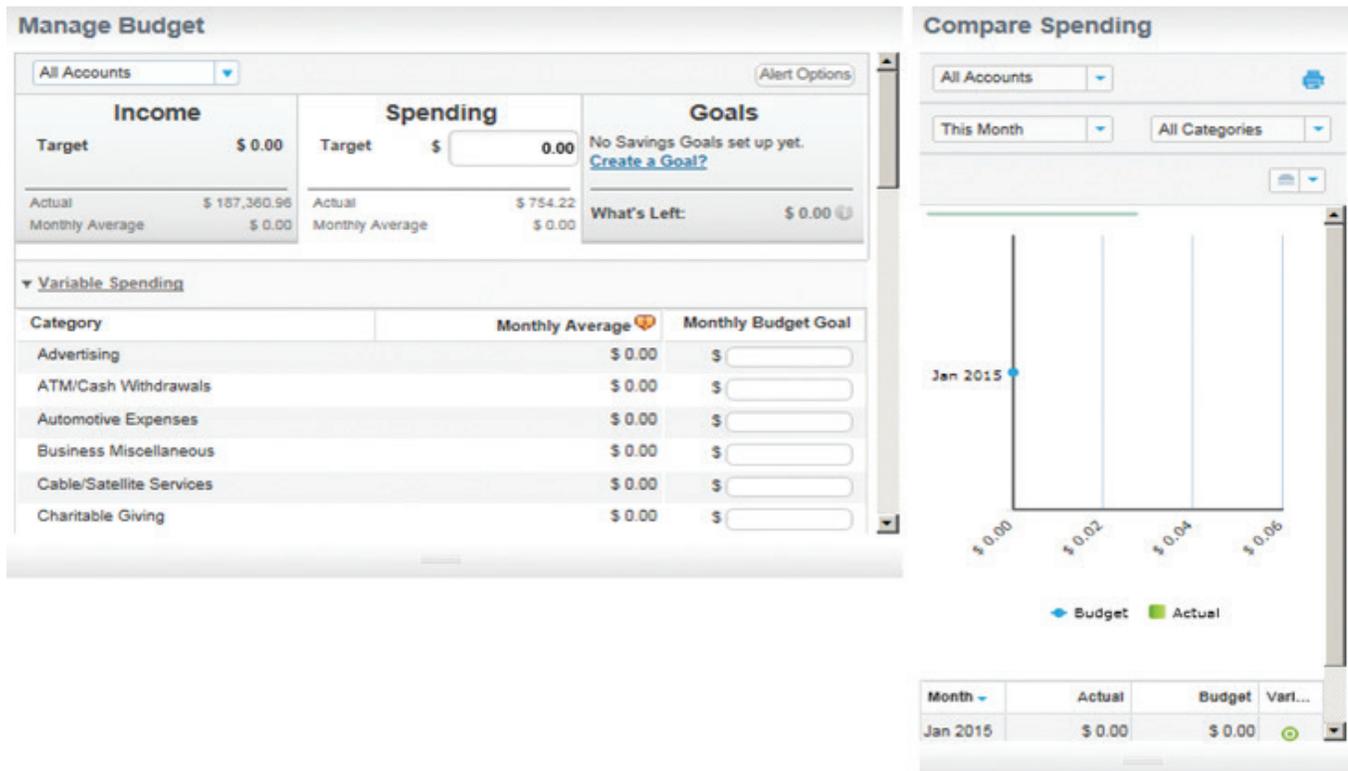
The screenshot displays the Bankers Trust Personal Finance Manager interface. The top navigation bar includes 'Accounts', 'Pay and Transfer', 'Personal Finance', 'Customer Service', and 'Open an Account'. The main content area is divided into several sections: 'Personal Finance', 'Accounts and Assets', 'Spending and Budget', 'Alerts', and 'Did you know?'. The 'Spending' section is highlighted, showing a donut chart titled 'Expenses for 12/01/2014 - 01/06/2015' and a table of categories with their respective percentages and amounts. Below the chart is a 'Transactions' table with columns for Status, Date, Description, Category, Amount, and Account.

Color	Categories	Percent	Amount
Light Blue	Groceries	28.16%	\$ 1,506.90
Dark Blue	Travel	28.02%	\$ 1,499.50
Light Green	Other Expenses	18.69%	\$ 1,000.00
Green	General Mercha...	7.96%	\$ 426.03
Red	Gasoline/Fuel	3.33%	\$ 178.27
Orange	Personal Care	3.33%	\$ 178.00
Yellow	Entertainment	2.82%	\$ 151.00
Purple	Gifts	2.09%	\$ 111.87
Light Purple	Restaurants/Di...	1.64%	\$ 88.00
Dark Purple	Home Improvem...	1.37%	\$ 73.36
Pink	Home Maintenan...	1.04%	\$ 55.83
Light Pink	Other Categories	1.53%	\$ 81.93
	Total	100.00%	\$ 5,350.69

Status	Date	Description	Category	Amount	Account
posted	01/22/2015	Pick'n Save	Groceries	-\$ 30.72	Chase - Credit Card - CREDIT CARD

## IMPROVED TOOLS

Sticking to a budget is already difficult enough. Let us make it easier on you. Your current tools will work better and have better visuals. As seen in the Manage Budget screen, the consolidation of resources has created a better snap shot of your finances to help reach your goals.

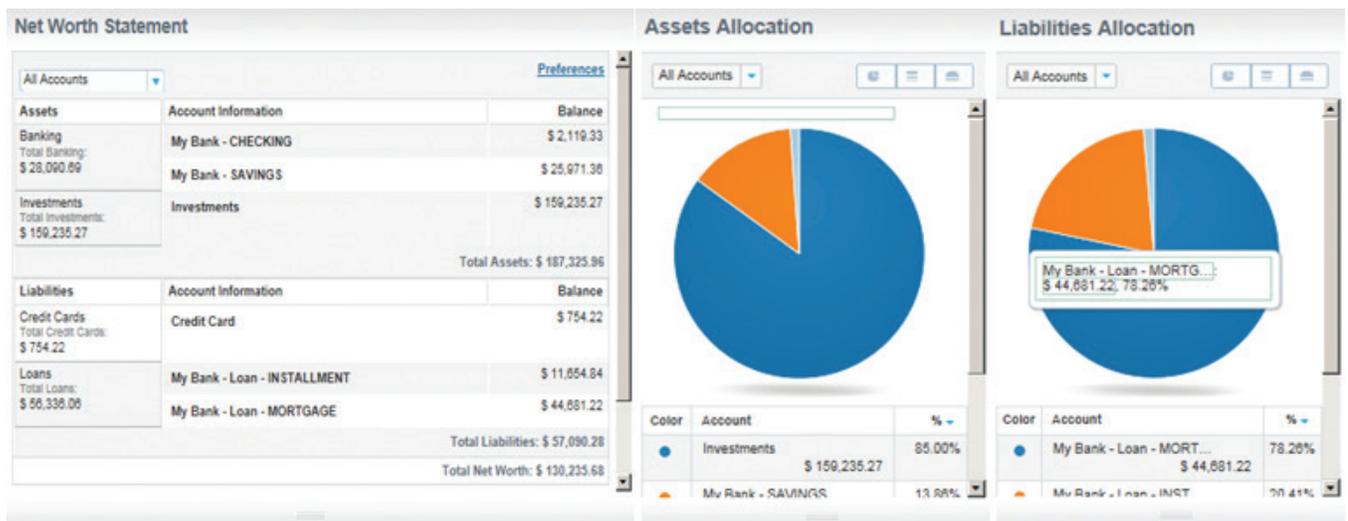


## BETTER BUDGETING

There is no time like the present to take control of your budget! With the proper tools and resources you will be able to make more informed decisions to help manage and improve your financial picture. It is our dedication to you that keeps us searching for better ways to make mapping finances easier.

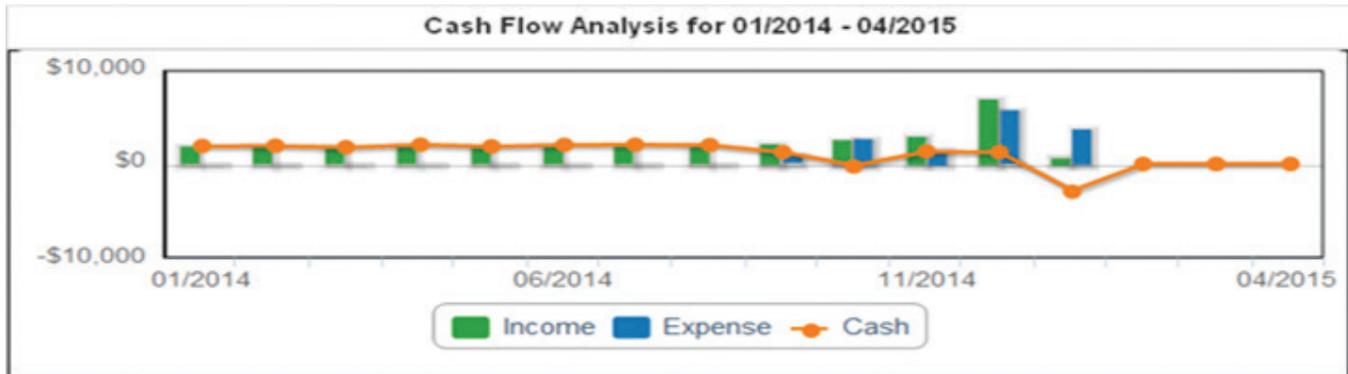
## NET WORTH

The new Net Worth page enables you to see your full net worth statement and charts indicating the allocation of assets and liabilities.



## CASH FLOW

Now you can quickly analyze your incoming and outgoing funds over a designated time frame. Having a positive cash flow can lead to more savings which means you reach your goals faster!



We hope the updated look, improved tools, and new resources for Personal Finance Manager continue to support you in reaching your goals! Customer Service is ready to assist with any questions about Personal Finance Manager and how it can make budgeting easier!

**For more information, please visit [BankersTrust.com/PFM](http://BankersTrust.com/PFM).**

Customer Service

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  **[BankersTrust.com](http://BankersTrust.com)**

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