Insights
in Think Online

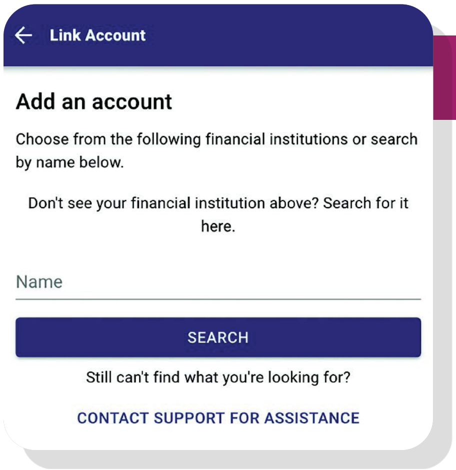
GET STARTED GUIDE

Now there's a better way to meet your money.

Build a budget, stay on track and plan for the future with Insights found in Think Online.

Insights - a more intuitive digital banking tool

It's easier than ever to manage your finances with Insights. You can build personal budgets, manage your cash flow and set goals for the future — all in one intuitive interface. It's one more way we help you achieve your financial goals.



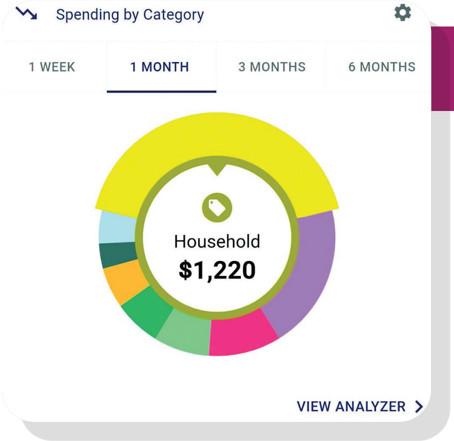
See all your accounts in one place

You can sync accounts from other financial institutions to get a full picture of your finances including credit cards, store cards, loyalty programs, loans, investments, checking and savings accounts.

Step 1: Navigate to the "Accounts" section.

Step 2: Click the plus sign to "Add Linked Account."

Step 3: Select an institution or use the search to find your institution. Enter the account information and select "Connect." You'll see a notification on your Dashboard once the account is successfully synced.



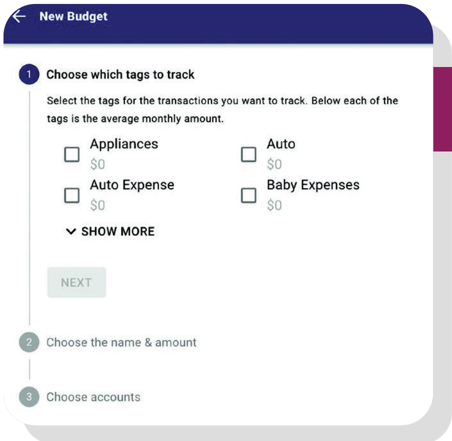
See your spending on the dashboard

The dashboard displays your top spending category each month.

Step 1: Click different parts of the wheel to see your spending breakdown. Transactions are sorted automatically into these categories with 'tags.'

Step 2: To personalize your categories, or split the transaction between tags, click on a transaction and edit the tag.

Step 3: When you select a transaction from the dashboard you can also change the name of the transaction, create a budget or add a recurring transaction to your Cashflow Calendar.



Set spending targets

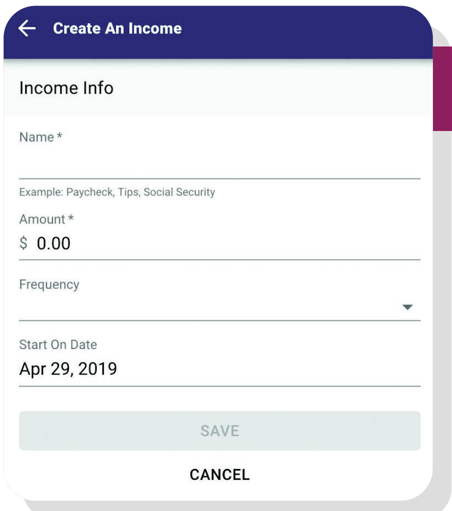
Gain valuable insights based on your spending habits. These insights will help you review your spending habits to help build a more realistic budget.

Step 1: Navigate to Budgets and click on "View Budgets."

Step 2: Choose one of the Spending Targets.

Step 3: Select "Edit Budget."

Step 4: Personalize your spending target by changing the monthly amount and item name (for example: "Baby Expenses"). Choose the purchase category tags you want to include in this budget.



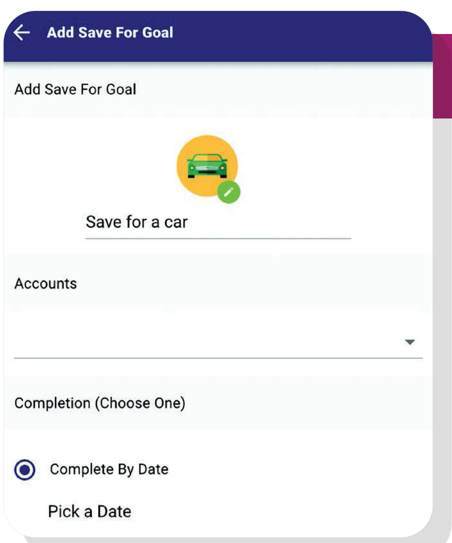
Track your cash flow

See down to the penny how much money you have coming in — and going out — each month. Simply log your income and bills into the Cashflow Calendar. Here's how:

Step 1: Navigate to the "Cashflow" section.

Step 2: Click the plus sign to add your income or bills.

Step 3: Put in your monthly income and expense amounts to calculate your monthly cash flow.



Create savings goals

You can set up goals to help you plan ahead — like saving for a vacation or paying off credit card debt. Once that's done your Goal Summary will show you the completion date and the amount you need to save each month.

Step 1: Navigate to the "Goals" section and select "Add Goal."

Step 2: Select your desired pay off or savings goal.

Step 3: Fill out the name of the goal, which accounts you'll use and your target date.

Step 4: Click "Save." Your goals will automatically update based on your progress and day-to-day account balance.

Try Insights today

It's a better way to meet your money.

Contact us if you have any questions at **1-800-288-3425**