

# Personal Finance Manager

Click an account tile to view details and transaction history. ✕

- Home
- Messages
- Transactions
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## Home

### FINANCIAL TOOLS

Net Worth | Budget | Spending | Trends | Debts | Cash Flow

[Link Account](#)

### CHECKING ACCOUNTS

Market Money 2304 Available Balance <b>\$8.31</b> Current Balance \$8.31	High Volume Checking 0101 Available Balance <b>\$4.35</b> Current Balance \$4.35
Checks 0801 Available Balance <b>\$8.80</b> Current Balance \$8.80	HSA 0803 Available Balance <b>\$7.50</b> Current Balance \$7.50
Bonus! 0802 Available Balance <b>\$4.19</b> Current Balance \$4.19	

### SAVINGS

You can review your accounts with a graphical view at the top of the page.

# Budget



Net Worth | **Budget** | Spending | Trends | Debts | Cash Flow

Link Account

< October 2019 >

+ Add New Budget



There are a variety of graphs with options you can choose to sort and filter the information.

# Net Worth

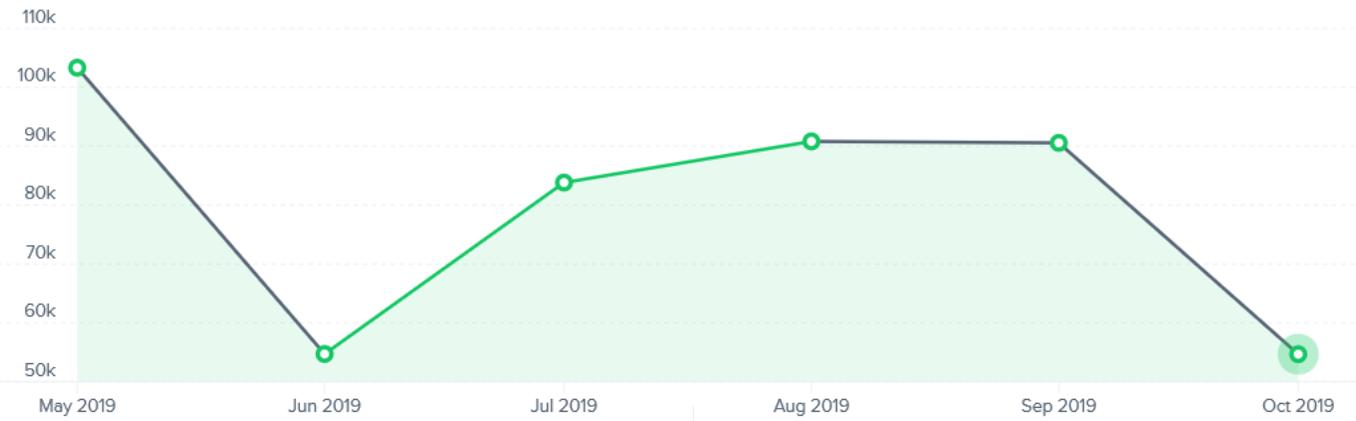


Net Worth | Budget | Spending | Trends | Debts | Cash Flow

Link Account

6M | 9M | 1Y

Current Net Worth  
**\$54,674.59**  
[View Assets & Liabilities](#)



Oct 2019 Net Worth  
**\$54,674.59**

From Previous Month  
**-\$35,899.88**

[Oct 2019 - Gains & Losses](#)

There are a variety of graphs with options you can choose to sort and filter the information.

View details or a check image by clicking '+' next to that transaction. Select 'Show Filters' for search options.

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**IBT MARKET MONEY 2304**  
Last Updated: October 16, 2019 12:45 PM

**\$8.31** | **\$8.31**  
Current Balance | Available Balance

Transactions Details

Search, Filter, Refresh, Download, More

Search transactions

Date	Description	Amount
OCT 15 2019	Internet Banking Transfer From Bonus Checking Transfer	\$0.01
OCT 2 2019	Internet Banking Transfer To Bonus Checking Transfer	(\$1.23)
OCT 2 2019	Internet Banking Transfer To Itasca Checking Transfer	(\$1.00)
SEP 30 2019	Internet Banking Transfer From Health Savings Transfer	\$0.50
SEP 27 2019	Internet Banking Transfer To Itasca Savings Transfer	(\$1.00)
SEP 27 2019	Internet Banking Transfer To Bonus Checking Transfer	(\$1.00)
SEP 27 2019	Internet Banking Transfer From High Volume Transfer	\$0.50
SEP 19 2019	Interest Interest Income	\$0.50

Each transaction will be automatically categorized for you.

View details or a check image by clicking '+' next to that transaction. Select 'Show Filters' for search options.

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**IBT** **MARKET MONEY 2304**  
Last Updated: October 16, 2019 12:45 PM

**\$8.31** | **\$8.31**  
Current Balance | Available Balance

Transactions Details

Date	Description	Amount
SEP 19 2019	 Interest Interest Income	\$0.01

Details

**Category:**

Interest Income

**Online Description:**

Interest

**Statement Description:**

Interest

**Date:**

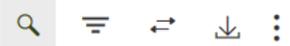
9/19/2019

**Type:**

Credit

OCT 15 2019  Internet Banking Transfer From Bonus Checking  
Transfer

SEP 18 2019  Internet Banking Transfer From Christmas Club



Search transactions

Some transactions may not be categorized, so they will be left as Uncategorized.

View details or a check image by clicking '+' next to that trans

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IBT **MARKET**  
Last Update

Transactions

Search transactions

Date

OCT 15 2019

OCT 2 2019

OCT 2 2019

SEP 30 2019

SEP 27 2019

SEP 27 2019

SEP 27 2019

SEP 19 2019

### Categorize

Internet Banking Transfer From Bonus Checking

- Auto & Transport
- Bills & Utilities
- Business Services
- Education
- Entertainment
- Fees & Charges
- Financial
- Food & Dining
- Gifts & Donations
- Health & Fitness
- Home
- Income
- Investments
- Kids
- Personal Care

You can choose an existing category or sub-category, or you can add your own.

**\$8.31** Current Balance | **\$8.31** Available Balance

- Search
- Filter
- Refresh
- Download
- More

\$2.50  
(\$1.63)  
(\$1.02)  
\$2.32  
\$0.01

Categorize

0117 9413G099 000027006

Search categories

- Fees & Charges
- Financial
- Life Insurance
- Financial Advisor
- Home Insurance Premium**
- Food & Dining
- Gifts & Donations
- Health & Fitness
- Home
- Income
- Investments
- Kids

You can create any categories you like.

Date	Description	Amount
MAR 23 2019	0117 9413G099 000027006	(\$103.00)
MAR 23 2019	Sur	(\$400.00)
MAR 23 2019	Fid	(\$150.00)
MAR 23 2019	Fid	(\$150.00)
MAR 22 2019	Tran	(\$234.38)

Amount
\$36,535.40
\$36,638.40
\$37,038.40
\$37,188.40
\$37,338.40

View details or a check image by clicking '+' next to that transaction. Select 'Show Filters' for search options.

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**IBT MARKET MONEY 2304**  
Last Updated: October 16, 2019 12:45 PM

**\$8.31** | **\$8.31**  
Current Balance | Available Balance

Transactions Details

Search transactions

🔍 ☰ ↔️ ⬇️ ⋮

Search transactions

Date Description

Change Category

OCT 15 2019	Internet Banking Transfer From Bonus Checking Auto & Transport		
OCT 2 2019	Internet Banking Transfer To Bonus Checking Transfer		
OCT 2 2019	Internet Banking Transfer To Itasca Checking Transfer		
SEP 30 2019	Internet Banking Transfer From Health Savings Transfer	\$2.50	⋮
SEP 27 2019	Internet Banking Transfer To Itasca Savings Transfer	(\$1.63)	⋮
SEP 27 2019	Internet Banking Transfer To Bonus Checking Transfer	(\$1.02)	⋮
SEP 27 2019	Internet Banking Transfer From High Volume Transfer	\$2.32	⋮
SEP 19 2019	Interest Interest Income	\$0.01	⋮

The transaction will be visually categorized according to the category you chose.

Click an account tile to view details and transaction history.

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### CHECKING ACCOUNTS

**IBT** Market Money 2304  
Available Balance **\$8.31**  
Current Balance \$8.31

**IBT** High Volume Checking 0101  
Available Balance **\$4.35**  
Current Balance \$4.35

**IBT** Checks 0801  
Available Balance **\$8.80**  
Current Balance \$8.80

**IBT** HSA 0803  
Available Balance **\$7.50**  
Current Balance \$7.50

**IBT** Bonus! 0802  
Available Balance **\$4.19**  
Current Balance \$4.19

### SAVINGS

You can link your external accounts as well.

View details or a check image by clicking '+' next to that transaction. Select 'Show Filters' for search options.

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**IBT** **MARKET MONEY 2304**  
Last Updated: October 16, 2019 12:45 PM

Transactions Details

Search transactions

Date	Description	Amount
OCT 15 2019	Internet Banking Transfer From Bonus Checking Split	\$0.01
Details More Details <u>Splits</u>		
	<b>1 - Internet Banking Transfer From Bonus Checking</b> Auto & Transport	\$0.01
	<b>2 - Internet Banking Transfer From Bonus Checking</b> Auto & Transport	<input type="text" value="\$0.00"/>
		<input type="button" value="X"/> <input type="button" value="✓"/>
		<input type="text" value="Enter a valid dollar amount"/>
		<input type="button" value="+ Split transaction"/>
OCT 2 2019	Internet Banking Transfer To Bonus Checking Transfer	(\$1.23)

You can split the transaction between multiple categories.

# Link Account



Find an institution by using the search box or select one from the Quick Picks list below. You may search by either institution name or website URL.

Search

## QUICK PICKS

- |   |  |
|---|--|
|  Chase Bank<br>www.chase.com   |  Bank of America<br>www.bankofamerica.com |
|  BMO Harris Credit Card<br>www.bmoharris.com   |  Capital One<br>www.capitalone.com        |
|  Wells Fargo<br>www.wellsfargo.com   |  US Bank<br>www.usbank.com                |
|  Citibank<br>online.citi.com   |  USAA<br>www.usaa.com                     |
|  American Express Credit Card<br>www.americanexpress.com   |  Discover Credit Card<br>www.discover.com |
|  Add a Manual Account<br>Represent an external account or asset to accurately reflect your financial health. <a href="#">Click here to get started.</a> |  |

Select the Financial Institution or use the search bar.

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# Link Account



Sign in using your Bank of America login credentials

 Bank of America   
www.bankofamerica.com

Online ID

Passcode

Don't remember your [Bank of America](#) Online ID or Passcode?

Continue

Enter your login details for this  
Financial Institution.

## Link Account



### Processing

It's taking a while to categorize the transactions.

You can close or link more accounts while we continue to process your request in the background.

Close

Link More Accounts

The account details, including transactions, will be processed.

# Link Account



Confirm the accounts you would like to link. Unselected accounts will not show up on your home page or in any of your personal financial planning tools.



Bank of America  
www.bankofamerica.com

Adv Relationship Banking -

Visible

Rewards Savings -

Visible

Bank of America Cash Rewards Visa Signature -

Visible

Cancel

Continue

You will be able to see all of your accounts linked to the login details you provided.

You can choose which ones to make visible.

Click an account tile to view details and transaction history.

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### ACCOUNTS2



**IBT** Card Account 7801  
Available Balance **\$293.87**  
Current Balance \$54.30

### LINKED ACCOUNTS



**CLB** External account  
Current Balance **\$100.00**  
Updated 2 days ago

**Discover it Card**  
Current Balance **\$1,091.83**  
Updated 29 minutes ago

### Link Account

Link additional accounts in order to view and manage all of your finances right here. [Click here to get started.](#)

The accounts will be available in a group called Linked Accounts.

Add an account nickname, choose the display order, hide an account & make other account related changes. ✕

- Home
- Messages <sup>1</sup>
- Transactions
- Services
- Help
- Settings
- Profile
- Account Preferences**
- Security Preferences
- Alerts
- Text Enrollment
- Mobile Authorizations
- Address Change
- Statement Delivery
- Themes
- Accessibility
- Branches
- Log Off

## Account Preferences

Click anywhere on the account row if you would like to add/edit an account nickname, enable SMS/Text banking or view account details. Group and sort accounts as they are displayed on the homepage.

Search by account label, name, nickname, number, or product type

### Accounts2



 Itasca Bank and Trust

**Card Account** XXXXXX7801

Itasca Checking VISIBLE SMS OFF

Details SMS/Text

Online Display Name

**Card Account** 

Current Account Group

Accounts2

Visibility

Visible

### Linked Accounts

 Crystal Lake Bank & Trust Consumer

**External account**

You can remove the accounts by un-linking them.

Add an account nickname, choose the display order, hide an account & make other account related changes. ✕

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- Services
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- Settings
- Profile
- Account Preferences**
- Security Preferences
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## Account Preferences

Click anywhere on the account row if you would like to add/edit an account nickname, enable SMS/Text banking or view account details. Group and sort accounts as they are displayed on the homepage.

Search by account label, name, nickname, number, or product type

### Accounts2



 Itasca Bank and Trust  
**Card Account XXXXXX7801**  
Itasca Checking **VISIBLE** **SMS OFF**



Details **SMS/Text**

Online Display Name  
**Card Account** 

Current Account Group

Accounts2 

Visibility

Visible

### Linked Accounts

 Crystal Lake Bank & Trust Consumer  
**External account**



Click on the visible link.

Add an account nickname, choose the display order

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- Transactions
- Services
- Help
- Settings
- Profile
- Account Preferences**
- Security Preferences
- Alerts
- Text Enrollment
- Mobile Authorizations
- Address Change
- Statement Delivery
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- Log Off

## Account

Click anyw  
accounts a

Search

## Account

Itasca

Card

Itasca C

Details

SMS/Text

Online Display Name

**Card Account** *edit*

Current Account Group

Accounts2

Visibility

Visible

Linked Accounts *edit*

Crystal Lake Bank & Trust Consumer

**External account**



## Warning

By hiding Itasca Checking, it will no longer display on the overview page or in your financial tools. You can continue to view and manage this account in the 'Hidden' group at the bottom of this page, and it will not affect statement delivery or change of address.

No, don't hide

Yes, hide

You will receive a warning message,  
and the accounts will be removed.