



This Quick Reference Guide provides an overview of FinanceWorks, powered by Quicken, an easy to use online tool that will help you simplify your financial life by enabling you to get a complete financial picture of your Connex accounts as well as 16,000+ other financial institutions and creditors.

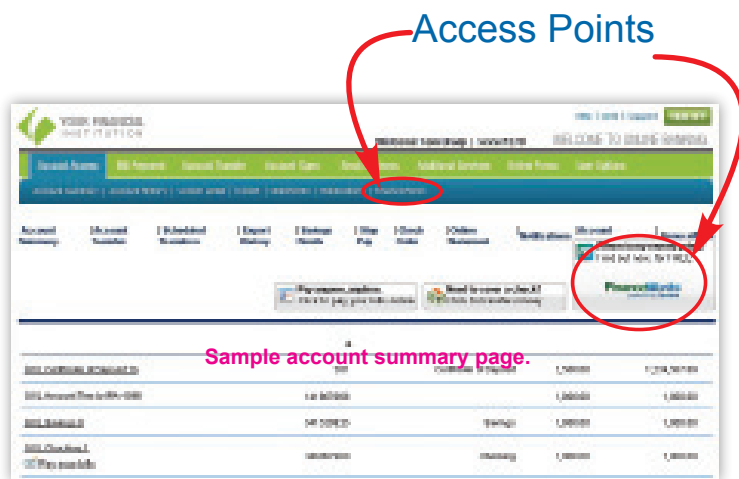
## ACCESSING FINANCEWORKS

### How to Access FinanceWorks

There are multiple ways to access FinanceWorks within Online Banking.

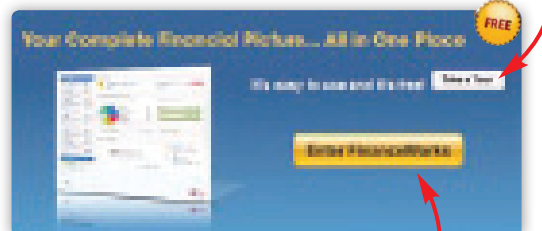
### FinanceWorks Landing Page

Upon first use, the links within Online Banking lead to the FinanceWorks landing page and you will need to accept the terms and conditions.



### Take a tour

You can click on the "Take a tour" button to see a flash demo of FinanceWorks.



### Enter FinanceWorks

To start using FinanceWorks, simply click on the "Enter FinanceWorks" button.

# OVERVIEW

## Outline of Key Features



**1 Accounts**  
Shows your Connex accounts with the ability to add accounts from more than 16,000+ other financial institutions and creditors to provide you with a complete financial picture.

**2 Your Taxes**  
Allows you to get organized for taxes with the Tax Watch report which tracks tax deductible expenses such as charitable contributions and child care. During tax season, quick link takes you directly into TurboTax for Online Banking.

**3 Where is my money going?**  
Shows a quick chart of where you are spending your money based on auto categorization of transactions with the ability to drill down to see more detail on the Trends page.

**4 Am I making my goals?**  
Allows you to quickly see your progress against your budget goals and set up alerts to be reminded if you are close to or have gone past your spending targets.

**5 Net Worth**  
Allows you to track your overall net worth.

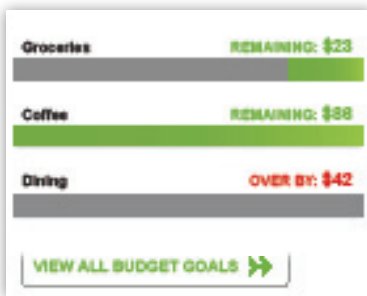
**6 Alerts and Reminders**  
Alerts and remainder help you track your budgets, pay bills on time, and get timely updates about your accounts.

**7 Small Business Features**  
Allows you to track business income and expenses in your personal accounts and simplify tax time.

**8 Other Tools**  
Provides quick links to tax and cash flow management tools and Bill Pay functionality.

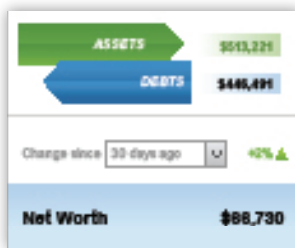


## 4 AM I MAKING MY GOALS?



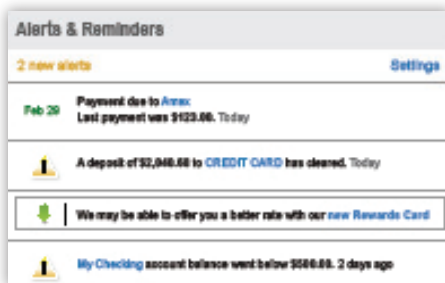
FinanceWorks automatically displays the top three spending categories on the home page with suggested spending target. By clicking on the “View all goals” button or the Goals tab, you can add more categories, edit the spending limits, and set up email reminders to be notified if you are approaching or have surpassed your spending goal for a particular category.

## 5 NET WORTH



FinanceWorks tracks your overall net worth by using the information from all of your accounts, as well as user-entered data for items such as your car and house.

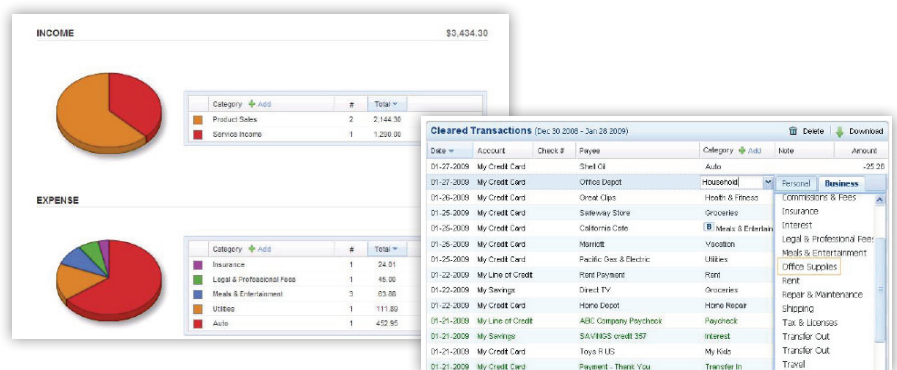
## 6 ALERTS AND REMINDERS



Alerts and reminders help you track your budgets, pay bills on time, and get timely updates about your accounts.

## 7 SMALL BUSINESS FEATURES

FinanceWorks helps small businesses manage simple bookkeeping and accounting by allowing you to separate business income and expenses from personal transactions. Once you recategorize anything as business transaction, the next time you use FinanceWorks, you will see a business tab where you can find a business income and expense report.



## 8 OTHER TOOLS

The other tools area includes quick links to Tax Watch, which tracks tax deductible expenses, and What's left, a cash flow management tool. The Make Payments link enables you to link directly into Bill Pay to schedule payments.

