

How to Create a Budget

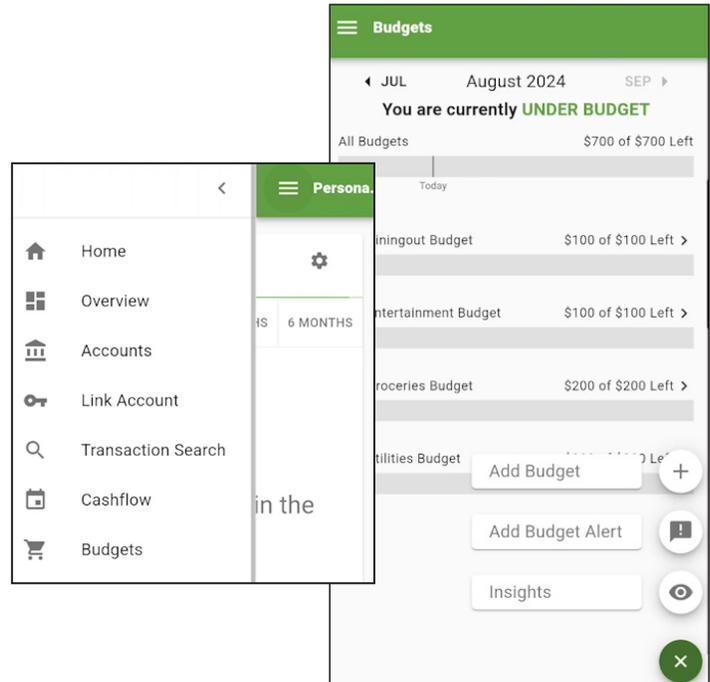
INSIDE OF SPENDING HABITS

Step 1: Open the Mobile App or log-in to Digital Banking.

Step 2: In the left-side menu, click on Spending Habits.

Step 3: Click on the 3 lines in top left. Then Click Budgets.

Step 4: Click on the Add Budget button, or click on the Plus sign and click Add Budget.



1 Choose which tags to track

Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.

<input type="checkbox"/> Clothing \$0	<input type="checkbox"/> Diningout \$0
<input type="checkbox"/> Education \$0	
<input type="checkbox"/> Entertainment \$1	
✓ SHOW MORE	

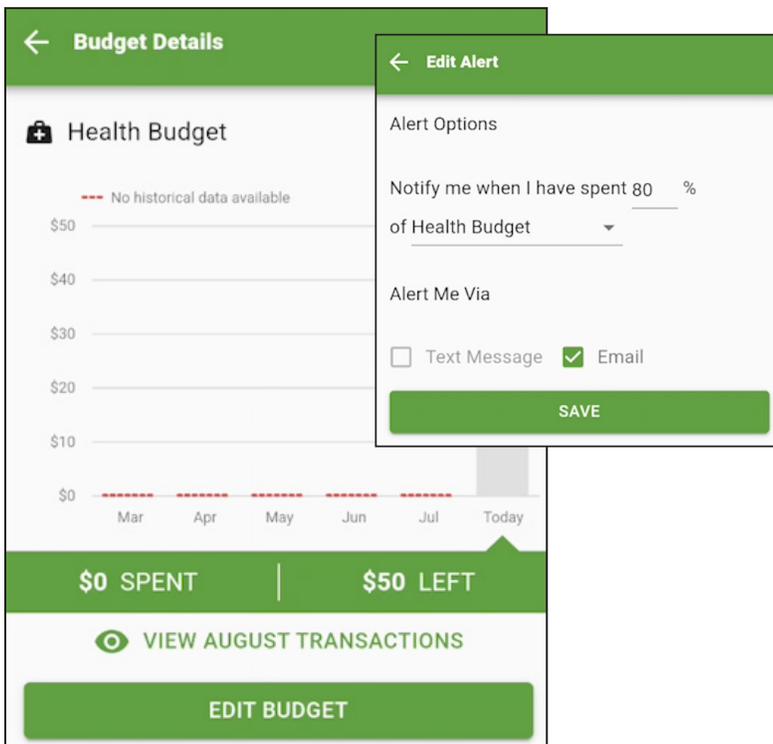
Step 5: Select which tags you'd like to track to create a budget that fits your specific goals.

Step 6: Name your budget and set a Monthly Limit.

Step 7: Create an alert for your budget here if you'd like one. This will automatically create an alert when your budget reaches 25%, 50%, and 80%.

Step 8: Select which account will be tracking your expenses for your budget.

Step 9: Click Finish.



Note: Click on your budgets to see details on your spending habits and which transactions were tagged. To edit, click Edit Budget. Make your edits, then Click Save.

If you need to edit your Budget Alerts, you can find them under the Alerts section of Spending Habits. (In the left-side menu, Click Alerts.) Simply click on it, make your edits, and click Save.

CONTACT US FOR ASSISTANCE at (844) 350-8512 or CustomerService@thecitizensbank.net.