

Add a Goal

You can create three types of Goals: Savings, Debt Payoff and Retirement. We encourage all users to start by setting up a savings account for an emergency fund; saving \$1,000 in an emergency-only account is a good start, but working towards 3-6 months of living expenses is a good longer-term goal.

To create a Savings goal:

1. Select the Savings Goal Type
2. Select a specific goal to save for
3. Customize the Goal Name
4. Specify the Amount to Save
5. Select an Account
6. Save

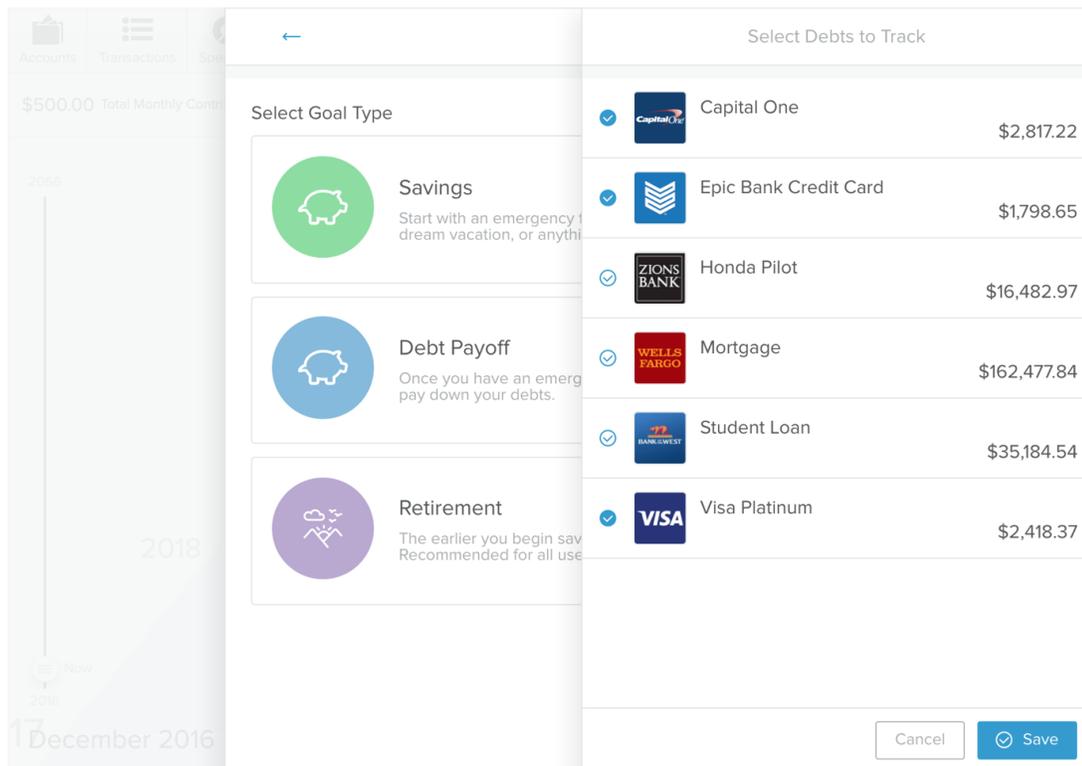
Each goal must be tied to its own account, which will be used to measure your progress towards each goal. You may choose to open new savings accounts in order to set additional goals.

The screenshot displays the 'Create New Goal' screen in a mobile application. At the top, there is a navigation bar with a back arrow and the title 'Create New Goal'. Below this, a green circular icon with a heart symbol is next to the text 'Emergency Fund'. A progress bar shows the current status as '\$0 / \$1,000' and '0%'. Underneath the progress bar, there are three input fields: 'Goal Name' with the value 'Emergency Fund', 'Amount to Save' with the value '1000', and 'Account' with the value 'Simple'. At the bottom right of the screen, there is a blue button with a white checkmark and the text 'Save'. On the left side of the screen, there is a sidebar menu with options like 'Accounts', 'Transactions', and 'Goals'. The bottom of the screen shows a calendar view for the year 2017, with 'December 2016' visible.

To create a Debt Payoff goal:

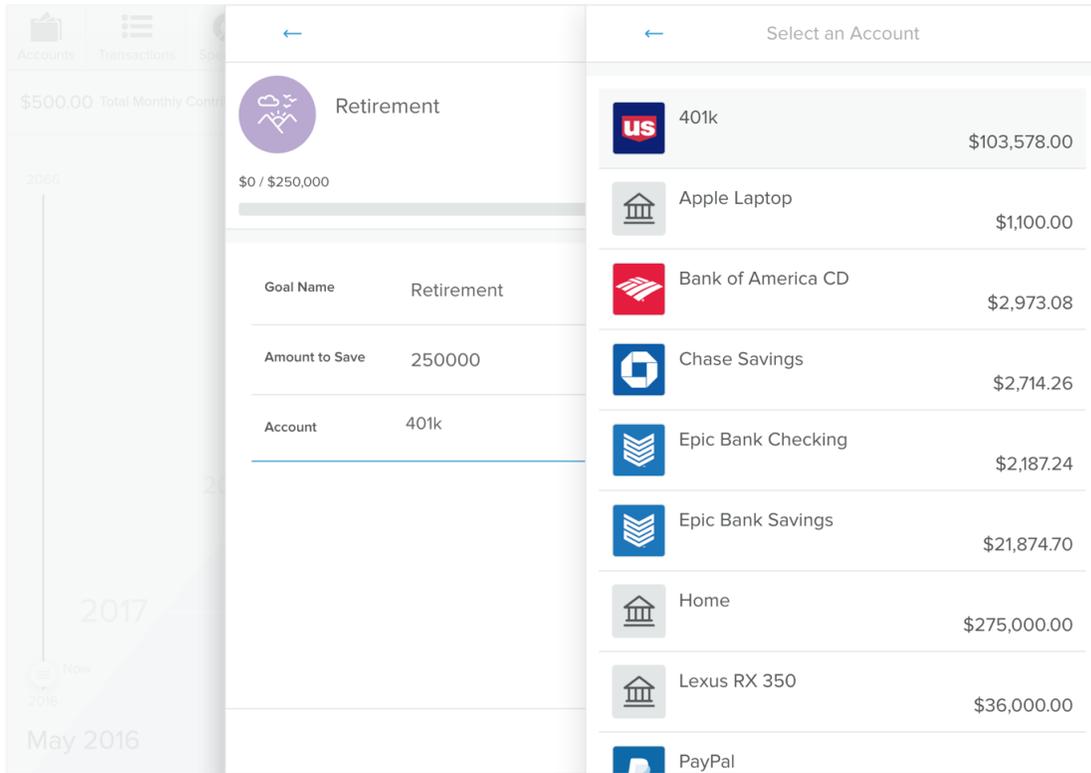
1. Select the Debt Payoff Goal Type
2. Select Debts to Track
3. Save

Note that while you can add any debt to the Goals tool, Goals will calculate your payoff based only on the amount you set to contribute in Goals, not accounting for any amount you have budgeted towards that debt in the Budgets tool. Therefore, the Goals tool is best used for unbudgeted debts (usually credit cards), unless you plan to manually adjust your Monthly Goal Contribution to account for budgeted expenses.



To create a Retirement goal:

1. Select the Retirement Goal Type
2. Specify the Amount to Save
3. Select an Account
4. Save



Manage Goals

The Manage Goals view gives users a quick overview of all current goals and progress towards each. Goals are separated by Type: Debt Payoff, Savings and Retirement. Additionally, the user is able to change the priority of current goals, by dragging a goal to the desired position in the list.

The screenshot displays the 'Manage Goals' interface with the following data:

Priority	Goal Name	Projected Start	Monthly Amount	Current Progress
1	Pay off Capital One	Projected Jun 2018	\$120 + \$50 Monthly	\$0 / \$2,817 (0%)
2	Pay off Epic Bank Credit Card	Projected Sep 2018	\$65 Monthly	\$0 / \$1,799 (0%)
3	Pay off Visa Platinum	Projected Oct 2018	\$90 Monthly	\$0 / \$2,418 (0%)

Additional interface elements include: 'DEBT PAYOFF', 'SAVINGS', and 'RETIREMENT' tabs; an '+ Add a Goal' button; a 'Goal Priority' header; and a 'Show Completed Goals' link at the bottom.