MONEY MANAGEMENT
MADE EASY

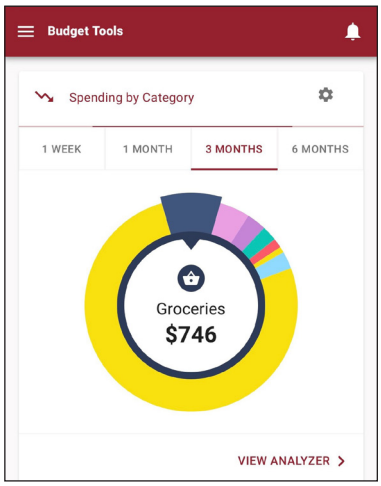
Budget Tools Quick Start Guide

Bring your bank accounts together—even those from other financial institutions—with our free Budget Tools from Community Bank. With Budget Tools, you get a complete financial picture that helps you track your goal progress, understand your spending habits, and make informed fiscal decisions.

Dashboard Overview

Easily view your top expenses in real-time with the interactive spending wheel.

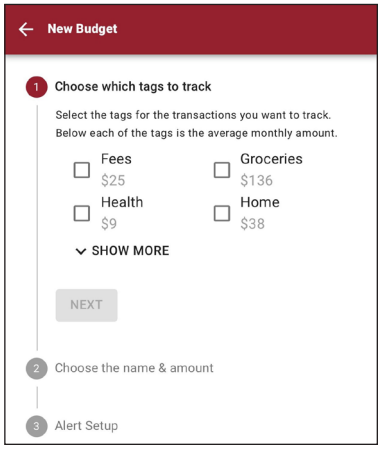
Step 1: Choose a time frame: 1 week, 1 month, 3 months, or 6 months.
Step 2: Select different colors on the spending wheel to view your category spending. Your transactions will categorize themselves with 'tags.'
Step 3: Click the center amount inside the circle to see a list of transactions from the selected category.
Step 4: Once you select a transaction, you can personalize it by changing the transaction name, editing or adding a new tag, and splitting the transaction between several tags.



Budgets

Build and view spending targets that are important to your financial big picture with Budgets.

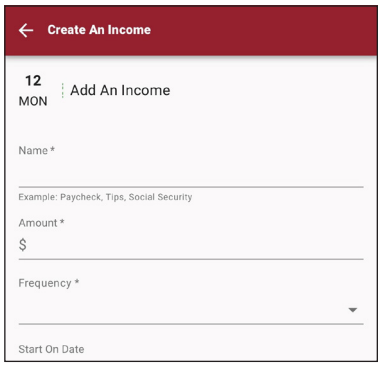
Step 1: Navigate to the "Budgets" tab.
Step 2: Click the "+" in the lower right corner or the "Add Budget" button.
Step 3: Choose which tags you'd like the budget to include.
Step 4: Pick a Budget Name and Monthly Limit for the budget.
Step 5: Select if you'd like alerts for the budget.
Step 6: Choose the bank accounts that apply to your budget and select "Finish."



Cashflow

Cashflow brings your budget to life with an interactive calendar of your scheduled income and expenses.

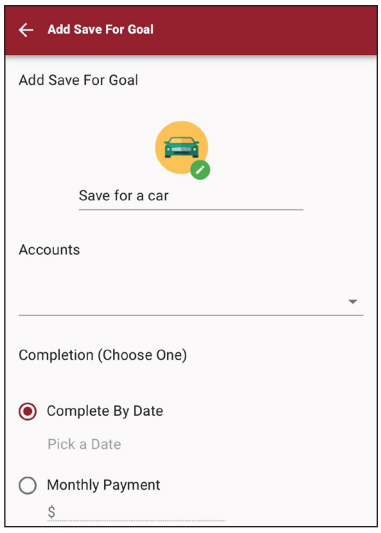
Step 1: Navigate to the "Cashflow" tab.
Step 2: Choose your preferred view: Agenda or Calendar.
Step 3: Click the "+" in the lower right corner or the "Add Income/Bill" button to add any income or expenses.
Step 4: Enter in the required information and select "Save."



Goals

Create goals like saving for a vacation or paying off a high-rate credit card. Goals will automatically update your progress and reflect your day-to-day account balances.

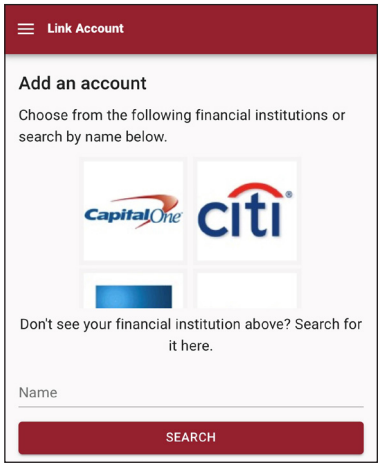
Step 1: Navigate to the "Goals" tab, and click the "+" in the lower right corner or the "Add Goal" button.
Step 2: Choose your desired savings or pay off goal.
Step 3: Pick a Goal Name, which Account it is for, and a method of Completion.
Step 4: Select if you'd like alerts for your goal.
Step 5: Click "Save" to complete the process of adding a new goal.
Your Goal Summary will update your completion date and the amount needed per month according to your preferences.



Adding Accounts

Syncing other accounts is simple and will help you keep track of all your finances in one convenient location.

Step 1: Navigate to the "Link Account" tab. Or from the "Accounts" tab, click the "+" in the lower right corner, and then "Add Linked Account."
Step 2: Select an institution or use the search bar to find your institution.
Step 3: Enter the required information and select "Connect."
You'll receive a notification on your Budget Tools dashboard once the account has been synced successfully.



Questions?

If you have any questions, call us at 1-866-764-8638, start a conversation via Support in Online Baking or our CBNA app, or stop in to your local branch.
To learn more about Budget Tools and view our demo video, visit **cbna.com**

Community Bank N.A.

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