

Money Management

What is Money Management?

- ⇒ Money Management is a fiscal tool used to view your complete financial picture all in one place.
- ⇒ Allows you to categorize transactions
- ⇒ Helps to improve your financial lives



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How is Money Management Similar to FinanceWorks™?

- ⇒ You will still be able to access Money Management from inside your OLB and Budget Widgets
- ⇒ All Farmers & Merchants Bank Accounts will automatically pull over.
- ⇒ You will be able choose outside accounts to include in your financial overview
- ⇒ Auto-categorization, split categories and the ability to add sub-categories
- ⇒ Spending Chart
- ⇒ Budgets, including smart auto-creation of budgets based on spending history.
- ⇒ Email Alerts



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So what's changing?

- ⇒ The Spending widget on the home page is being replaced with an interactive Budgets widget
- ⇒ Tax Watch is being replaced with a broader categorization reporting that includes not only charitable donations and child care expenses, but every other category as well.



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So what's new with Money Management?

- ⇒ You'll now be able to access your financial picture in our Farmers & Merchants Bank Mobile App!
- ⇒ Improved category-level trends
- ⇒ Debt payoff forecast
- ⇒ Detailed net-worth analysis and tracking
- ⇒ Expanded goals to include savings and retirement
- ⇒ Cash flow calendar
- ⇒ Text alerts in addition to email alerts
- ⇒ Support—your questions will be answered by a Money Management Expert within 1 business day.
- ⇒ Account details will refresh both nightly and real-time whenever an end users logs into Money Management.



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How much of my current FinanceWorks™ data will transfer over?

- ⇒ 18 months worth of FinanceWorks™ data will migrate over
- ⇒ For security reasons, we are not migrating outside account login credentials.
- ⇒ In order for Money Management to accurately assess your data, budgets, goals, transaction categories and alerts will not migrate over. Money Management will walk you through the process of setting up each item.



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To learn more about the Money Management Tool, check out the videos below.

- ⇒ [Money Management Video Overview-With the use of our Mobile App](#)
- ⇒ [Money Management Video Overview-Without the use of our Mobile App](#)



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