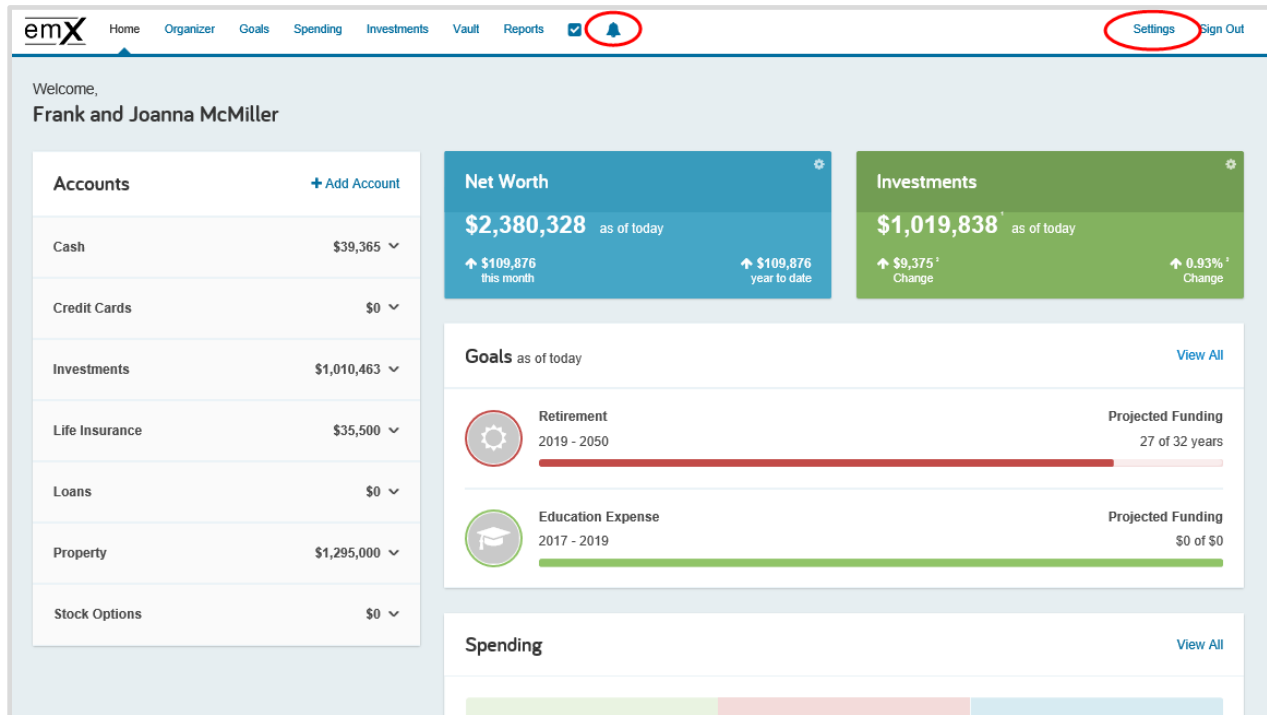


# Alerts

This training guide will demonstrate how to set up alerts around the information and financials entered in to your personal financial management site!

**Please Note:** Your advisor has the ability to customize which alerts are available to you on your website.

1. From your Home page, click **Settings** or the **Bell** icon.



2. The Delivery Settings allow you to permission alerts being sent to an email and if you want to be notified on your home page that an alert has been triggered.

To add an email recipient, click the **Add/Show** drop down and enter in the recipients email. Click the Plus sign when complete.

Toggling **ON** Home Page Notifications allows you to see triggered alerts for a set number of days before they expire.

# Alerts

Alerts Security Privacy

**Delivery Settings**

1 Email Recipients Alerts will be sent to these email addresses [Show](#)

On Home Page Notifications Show notifications on your home page for 14 days

3. Personal Financial Alerts allow you to set up notifications for things relevant to your financials – these alerts are tied to the spending information brought over through Accounts. To add accounts directly from a financial institution, please refer to the Adding Accounts user guide.

Personal Finance

Off Weekly Financial Summary A periodic overview of your finances (email only)

Off Low Cash Balance When the balance of [any cash account](#) falls below

Off High Credit Balance When the balance of [any credit card](#) rises above

Off Large Expenses When any expense occurs that is larger than

Off Large Deposits When any deposit occurs that is larger than

Off Bank Fees When any bank fee occurs that is greater than

Off Budget Exceeded When your spending exceeds [any of your budgets](#)

Off FICA Maximum Approaching When you're nearing your [FICA max withholding](#) for the year

# Alerts

4. Investments alerts are relating to the underlying investment holdings in your portfolio.

The screenshot shows the 'Investments' alert settings page. It features a list of five alert categories, each with a toggle switch, a description, and a configuration option. The categories are: 'Investment Activity' (toggle Off, description: 'When specific types of investment transactions occur'), 'Unbalanced Portfolio' (toggle Off, description: 'When your investment portfolio is out of balance by more than: 10%'), 'Concentrated Position' (toggle Off, description: 'When a stock or bond makes up more than this much of your portfolio: 40%'), 'Excess Cash Position' (toggle Off, description: 'When cash makes up more than this much of your portfolio: 33%'), and 'Security Prices' (toggle Off, description: 'Monitor the prices of stocks and mutual funds'). Each category has a minus and plus button to adjust the percentage, and the 'Security Prices' category has an 'Add' button.

5. Reminders are date based alerts.

The screenshot shows the 'Reminders' alert settings page. It features a list of six alert categories, each with a toggle switch, a description, and a configuration option. The categories are: 'End of Year Planning' (toggle Off, description: 'Annual financial housekeeping tips'), 'Insurance Policy Anniversary' (toggle Off, description: 'Annual reminder of policy renewal date'), 'Tax Filing Dates' (toggle Off, description: 'When tax filing dates are approaching', frequency: 'Annually'), 'Frank's Social Security Benefits' (toggle Off, description: 'When Frank is approaching age', age: '62'), 'Joanna's Social Security Benefits' (toggle Off, description: 'When Joanna is approaching age', age: '62'), and 'Required Minimum Distributions' (toggle Off, description: 'Annual reminder to meet your RMD requirements'). The 'Important Dates' category (toggle Off, description: 'Birthdays, anniversaries, or any other date you want to remember') has an 'Add' button.

6. Triggered alerts will appear as notifications from your Alerts icon!

The screenshot shows the user interface of the application. The top navigation bar includes 'Home', 'Organizer', 'Goals', 'Spending', 'Investments', 'Vault', 'Reports', and a notification bell icon circled in red. Below the navigation bar, the user's name 'and Joanna McMiller' is displayed. A notification dropdown menu is open, showing a 'REMINDER' for 'August 23 - Annual Review' on 'Aug 22', which is also circled in red. The bottom of the screen shows a 'Net Worth' section with a '+ Add Account' button.