

Budget Quick Start Guide (Online Banking)



Follow the steps below to set up a budget.

1. Logon to Online Banking using your desktop computer.
2. Click the Financial Wellness widget listed at the left of your Online Banking dashboard. If it's not visible, click the More... Button to view the full list of available widgets.
3. Click on the Financial Wellness widget to display a summary of your spending patterns. You can even filter which accounts you'd like it to analyze—including your linked accounts from other institutions. Click the **Accounts:** link (located above the Transactions list) and check the accounts you'd like to include in your analysis.
4. To view your spending analytics for a defined time period, select the pull-down menu in the upper right-hand corner, and select your desired time period. You can view your current month, previous month, or previous 3, 6, or 12 months of spending.
5. View spending and deposits. Here are just a few of the many categories you may see:
 - Restaurants & Dining
 - Mortgage/Rent
 - Groceries
 - Auto Expenses
 - Credit Card Payments
 - Health & Pharmacy

Remember, with Account Aggregation, you can view all of your account(s) with FCU *and* any account(s) you have linked to FCU Anywhere with another financial institution, lender, or investment company. Everything is in one place – increasing convenience by making money management easier and less time consuming.

You can also edit transaction descriptions and categories in the Financial Wellness widget. To learn more:

- [Watch a Video Demonstration](#)