

How to Create a Savings Goal

Creating a savings goal will allocate a certain amount of money from one account to another over time to reach a long-term goal, such as a vacation or a new car. Follow these steps to learn how to set one up.

	Savings Goal
Goal tile will be located on your main dashboard. Click Create a Savings Goal.	Create a savings goal to save for a emergency, vacation or education
	Create a Savings Goal Where will you save to? S REGULAR SHARE \$8.41
From the dropdown, select the Savings Account to save to.	*260-500
	*260-S00
	REGULAR SHARE \$855.11 *670-S00
	REGULAR SHARE \$0.00 *850-S00
	REGULAR SHARE \$827.35 *170-S00
Select what you are saving for from the dropdown.	What are you saving for? Vacation Vacation
	Emergency Fund
	Education
Enter a Description for the savings goal.	Description
	Amount
Enter the goal Amount.	\$ 2000.00



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6.	Enter the Target Date for the savings goal.	Target Date ☑ 7/4/2023 ✓
7.	Click Create Savings Goal.	Create Savings Goal Cancel
8.	Your savings goal will now appear on your dashboard.	Savings Goal
	To fully utilize this goal, set up a scheduled transfer to help fund it! Ex: Transfer \$50 biweekly	Vacation Beach or bust! \$11.91 90 \$1,500.00 Saved Days to Go Goal Make a Transfer