

CENTRAL
BANK

Savings\$

Goal Builder

AVAILABLE IN
ONLINE BANKING



WEDDING



NEW CAR



VACATION



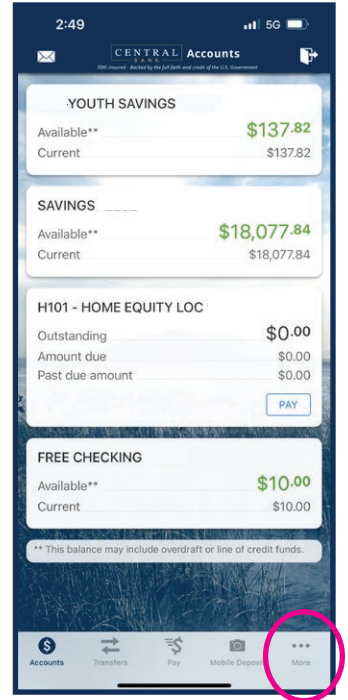


WHAT IS GOAL BUILDER?

Goal Builder helps you reach your financial goals by allowing you to virtually allocate funds within a single account for each specific goal. Whether it's saving for that dream vacation, new car or wedding—Goal Builder from Central Bank will help you get there.

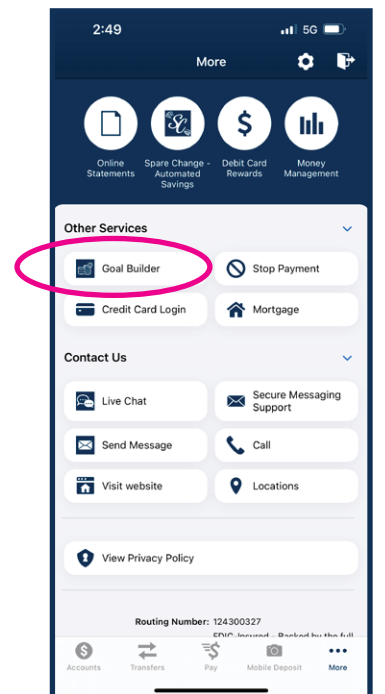
1. Open the **Central Bank Mobile App** or log into online banking on a desktop computer

2. Tap **More** on mobile and select **Get Started** or **Add**

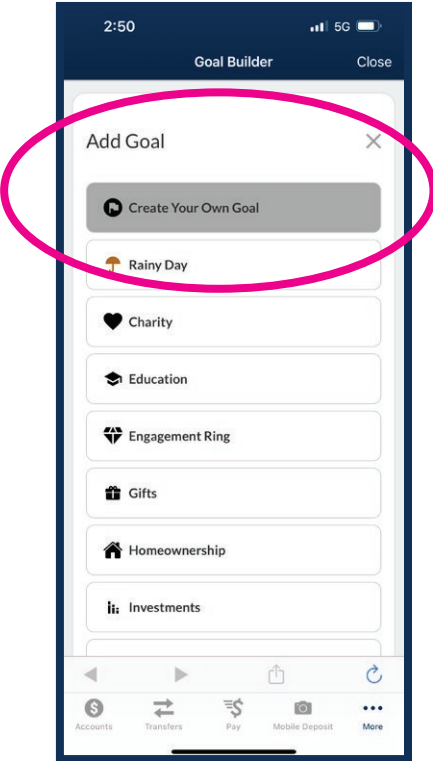


3. Tap **Goal Builder** on mobile; on desktop, locate the Goal Builder widget on the main online banking dashboard

4. Select the Central Bank account type you wish to link to Goal Builder



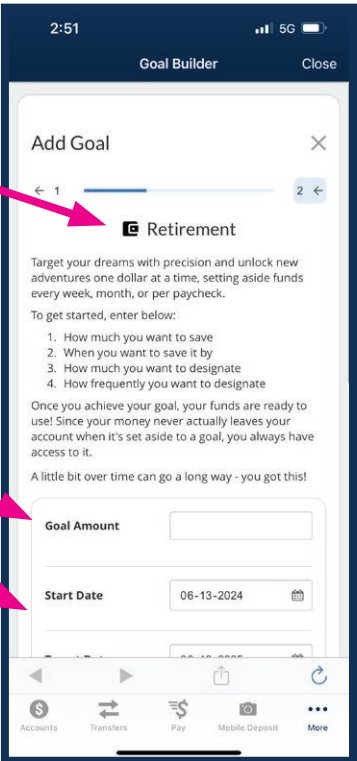
5. Add a savings goal: Select from ready-to-use goals or use the **Create Your Own Goal** option.



6. Give your goal a name (i.e. Retirement)

7. Edit **Goal Amount**

8. Choose **Start Date**

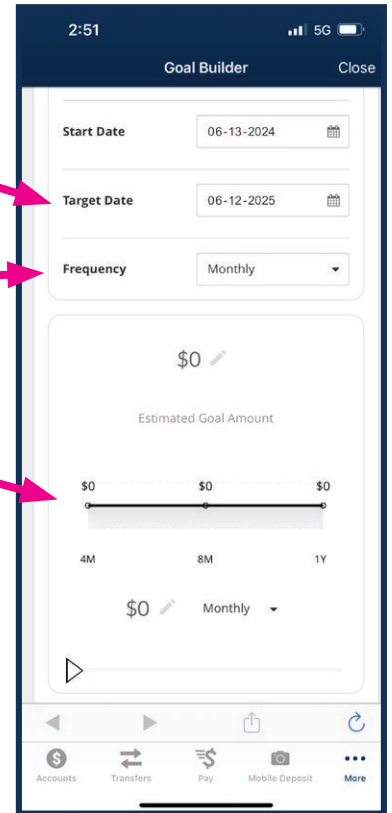


9. Choose a **Target Date**

*Changing the target date will determine how much money will be allocated based on the frequency of the occurrence.

10. Choose how frequent the allocation occurs

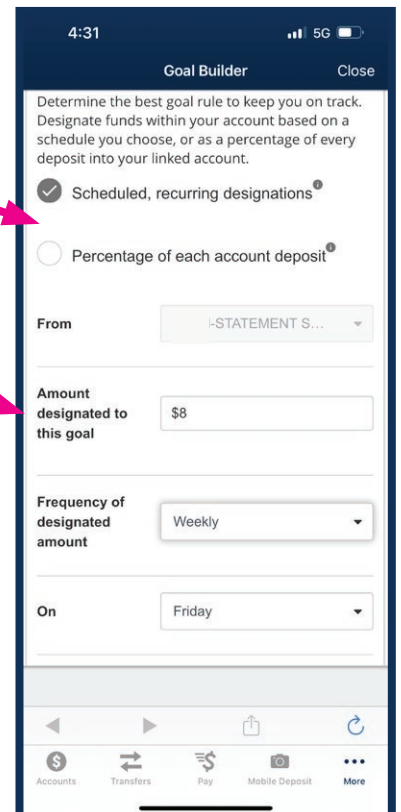
The graph will adjust as the information changes.



11. Determine the allocation type

- **Recurring**
- **Percentage of account deposits**

12. Edit allocation amount - or keep it at the calculated amount



13. Review your goal and **confirm**

MANAGING YOUR GOAL

You can view ACTIVE, COMPLETED and INACTIVE goals on the summary page.

ACTIVE GOALS

These goals are actively allocating funds. Rainy Day Fund will always be active and listed at the top.

COMPLETED GOALS

These goals have been met and closed by the user. A met goal will continue to allocate until closed.

INACTIVE GOALS

These goals are incomplete and have been paused by the user.

