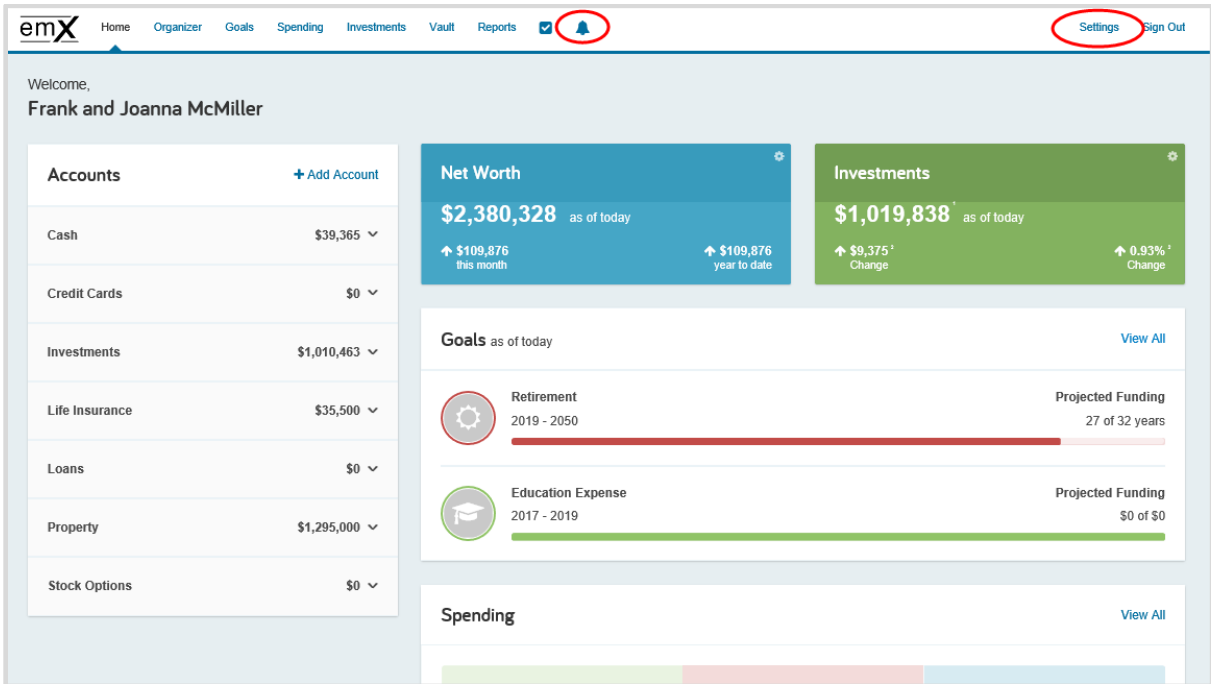


# Alerts

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

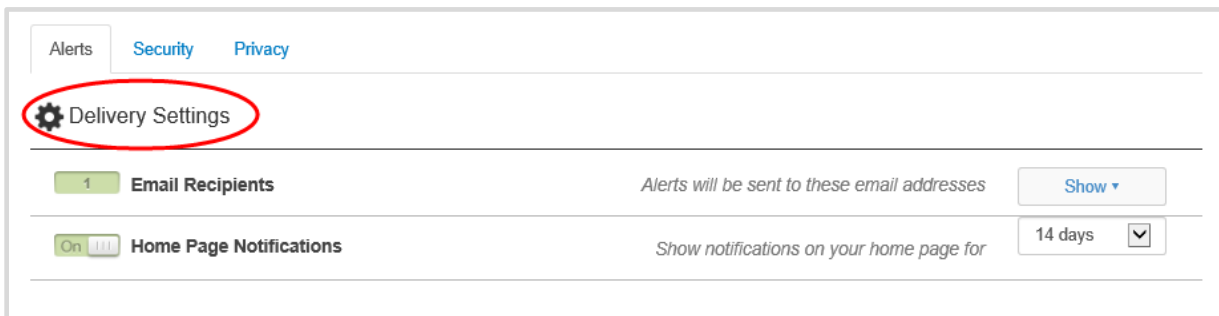
**Please Note:** Your advisor has the ability to customize which alerts are available to you on your website.

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


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
 

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<input type="checkbox"/> Off	<b>Weekly Financial Summary</b>	A periodic overview of your finances (email only)	
<input type="checkbox"/> Off	<b>Low Cash Balance</b>	When the balance of <a href="#">any cash account</a> falls below	<input type="text" value="\$500"/>
<input type="checkbox"/> Off	<b>High Credit Balance</b>	When the balance of <a href="#">any credit card</a> rises above	<input type="text" value="\$2,500"/>
<input type="checkbox"/> Off	<b>Large Expenses</b>	When any expense occurs that is larger than	<input type="text" value="\$1,000"/>
<input type="checkbox"/> Off	<b>Large Deposits</b>	When any deposit occurs that is larger than	<input type="text" value="\$1,000"/>
<input type="checkbox"/> Off	<b>Bank Fees</b>	When any bank fee occurs that is greater than	<input type="text" value="\$1"/>
<input type="checkbox"/> Off	<b>Budget Exceeded</b>	When your spending exceeds <a href="#">any of your budgets</a>	
<input type="checkbox"/> Off	<b>FICA Maximum Approaching</b>	When you're nearing your <a href="#">FICA max withholding</a> for the year	

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

 Investments
 

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<input type="checkbox"/> Off	<b>Investment Activity</b>	When specific types of <a href="#">investment transactions</a> occur	
<input type="checkbox"/> Off	<b>Unbalanced Portfolio</b>	When your investment portfolio is out of balance <a href="#">by more than</a> :	<input type="text" value="10%"/>
<input type="checkbox"/> Off	<b>Concentrated Position</b>	When a stock or bond makes up <a href="#">more than this much</a> of your portfolio:	<input type="text" value="40%"/>
<input type="checkbox"/> Off	<b>Excess Cash Position</b>	When cash makes up <a href="#">more than this much</a> of your portfolio:	<input type="text" value="33%"/>
<input type="checkbox"/> Off	<b>Security Prices</b>	<a href="#">Monitor the prices</a> of stocks and mutual funds	<input type="button" value="Add"/>

# Alerts

5. Reminders are date based alerts.

Reminders		
<input type="checkbox"/> Off	End of Year Planning	Annual financial housekeeping tips
<input type="checkbox"/> Off	Insurance Policy Anniversary	Annual reminder of policy renewal date
<input type="checkbox"/> Off	Tax Filing Dates	When tax filing dates are approaching <span>Annually</span>
<input type="checkbox"/> Off	Frank's Social Security Benefits	<a href="#">When Frank is approaching age</a> <span>62</span>
<input type="checkbox"/> Off	Joanna's Social Security Benefits	<a href="#">When Joanna is approaching age</a> <span>62</span>
<input type="checkbox"/> Off	Required Minimum Distributions	Annual reminder to meet your <a href="#">RMD requirements</a>
<input type="checkbox"/> Off	Important Dates	Birthdays, anniversaries, or any other date you want to remember <span>Add</span>

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

Home Organizer Goals Spending Investments Vault Reports  

and Joanna McMiller

**ALERTS** Manage

REMINDER August 23 - Annual Review Aug 22

Accounts + Add Account Net Worth In