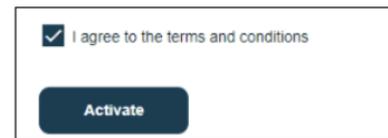
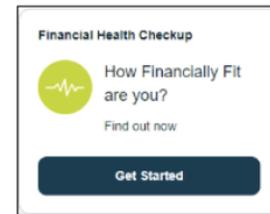


Savings Tools - Financial Health Check Up

Step 1

Login to online banking.

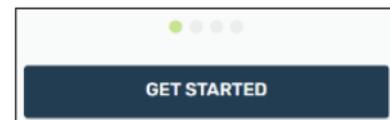
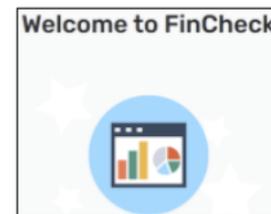
Locate the “Financial Health Check Up” tile in account dashboard. First time use Click “Get Started” and accept terms and conditions. Click “Activate” and Activation in Progress message will appear. Click “Back to Dashboard”



Step 2

Financial Health Set Up

Use once activation is complete. Click “Get Started” then Click “Get Started” again from the pop up.



Step 3

Link All Financial Accounts

Verify all share accounts on your membership appear. Only accounts on the associated username will appear

Click “Continue”



Step 4

Enter the following personal information:
Year of birth, Annual gross household income and Credit score.

Click “Next”



Note: US Eagle does not use this information. It is only used to calculate financial health.



Step 5

Select all household statuses that apply to you.

Household Status

Employed (includes self-employed)	<input type="checkbox"/>
Married	<input type="checkbox"/>
Have Dependents Under 25	<input type="checkbox"/>
Have a Vehicle	<input type="checkbox"/>
Rent my Home	<input type="checkbox"/>
Own my Home	<input type="checkbox"/>

Step 6

Select all insurance plans that apply to you.

Select "Next"

Select the Insurance Plans You Have

<input type="checkbox"/> Life	<input type="checkbox"/> Health
<input type="checkbox"/> Disability	<input type="checkbox"/> Auto
<input type="checkbox"/> Homeowners	<input type="checkbox"/> Renters

NEXT

Step 7

Select the following to best describe your spending habits

Select "Next"

Tell us about your financial planning habits

Always plan ahead

Occasionally plan ahead

Rarely plan ahead

Never plan ahead

Don't need to plan ahead because there is always enough money to cover expenses

NEXT

Step 8

Select the following goals to save for in the next 5-10 years

Select "Finish"

Tell us about your financial planning habits

<input type="checkbox"/> Education	<input type="checkbox"/> Buy a Car
<input type="checkbox"/> Pay Down Debt	<input type="checkbox"/> Buy a Home
<input type="checkbox"/> Travel	<input type="checkbox"/> Home Improvement/Remodel
<input type="checkbox"/> Special Occasion (i.e. Wedding)	<input type="checkbox"/> Large Purchase
<input type="checkbox"/> Grow My Family	<input type="checkbox"/> Other _____

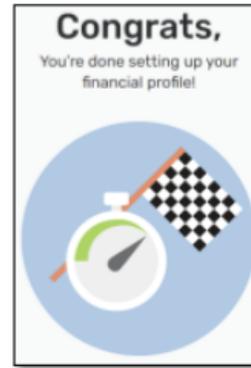
FINISH



Step 9

Completion Screen

Click "OK, Let's go"



REVIEWING FINANCIAL HEALTH

Step 1

Use once the checkup settings from above steps are in place you will see the Financial Health Indicator which shows overall financial health status.

Review detailed reasoning below.



Step 2

Spend to Income Ratio. Spend and income is pulled from transaction history

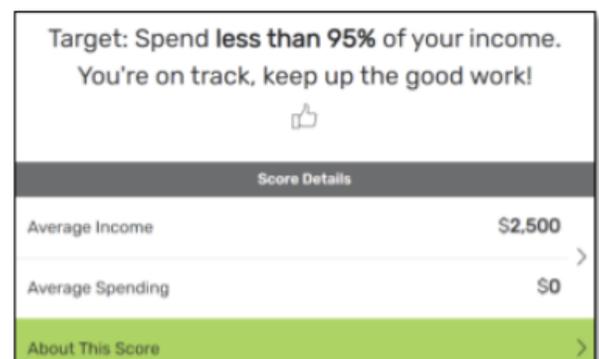
Click on the tile for more details.



Step 3

Bill Pay. Bills are pulled from the transaction history. Bills can be marked as paid by clicking on the tile and selecting, "Mark as paid"

Click on the tile for more details





Step 4

Debt To Income Ratio

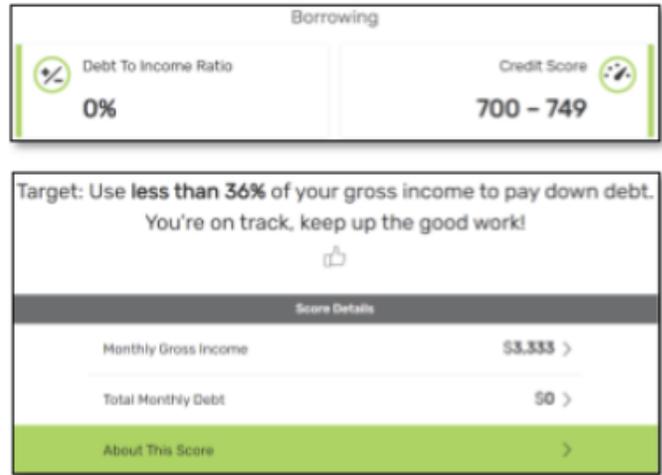
Debt is pulled from transaction history. Income is pulled from questions during the profile build.

Click on the tile for more details.

Credit Score

Credit score is pulled from questions during the profile build.

Click on the tile for more details.



Step 5

Insurance

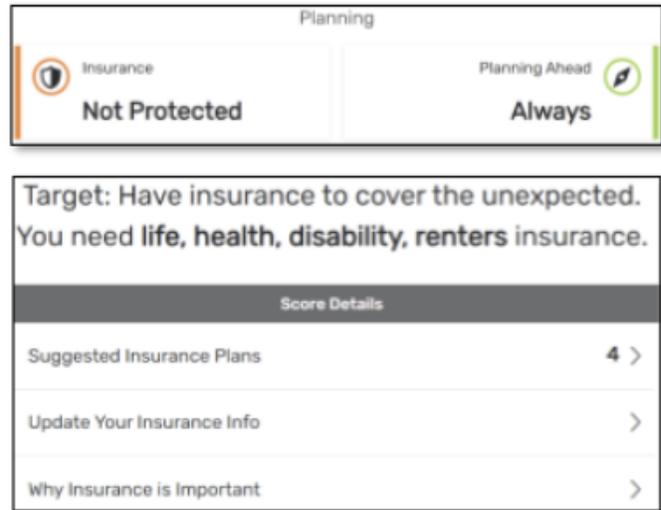
Insurance information is pulled from questions during the profile build.

Click on the tile for more details

Planning Ahead

Planning selection is pulled from questions during the profile build

Click on the tile for more detail.



Step 6

Emergency Savings is pulled from transaction history and is calculated based on US Eagle accounts being able to cover at least 3 months of expenses.

Refer to debt section for considered expenses



If you have any questions, please feel free to call us at 505-342-8888 or 888-342-8766, or schedule an appointment with us by visiting useagle.org/appointments.

