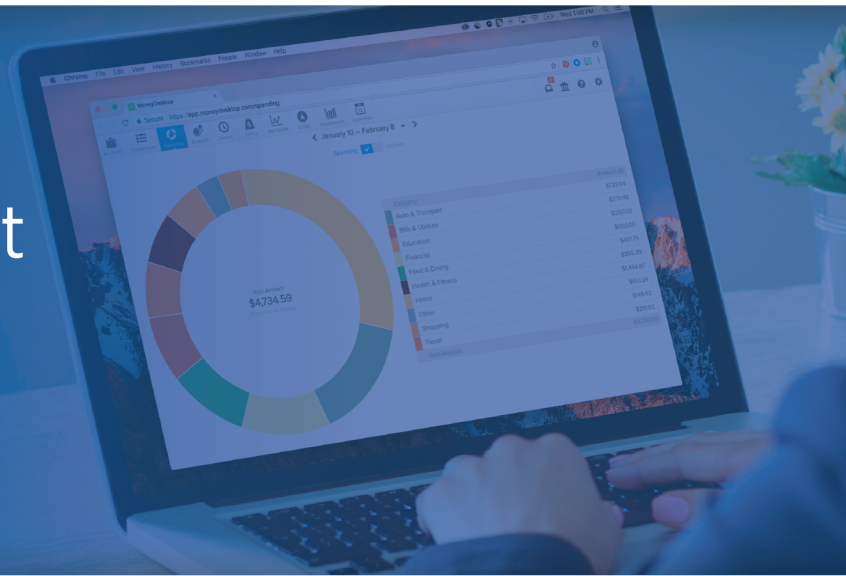# OLD NATIONAL BANK®

*Your bank. For life.*™

Money Management
Goals

O

Goals FAQs

You can create three types of Goals: Savings, Debt Payoff and Retirement. We encourage all users to start by setting up a savings account for an emergency fund; saving $1,000 in an emergency-only account is a good start, but working towards 3-6 months of living expenses is a good longer-term goal.

To create a Savings goal:

1. Select the Savings Goal Type
2. Select a specific goal to save for
3. Customize the Goal Name
4. Specify the Amount to Save
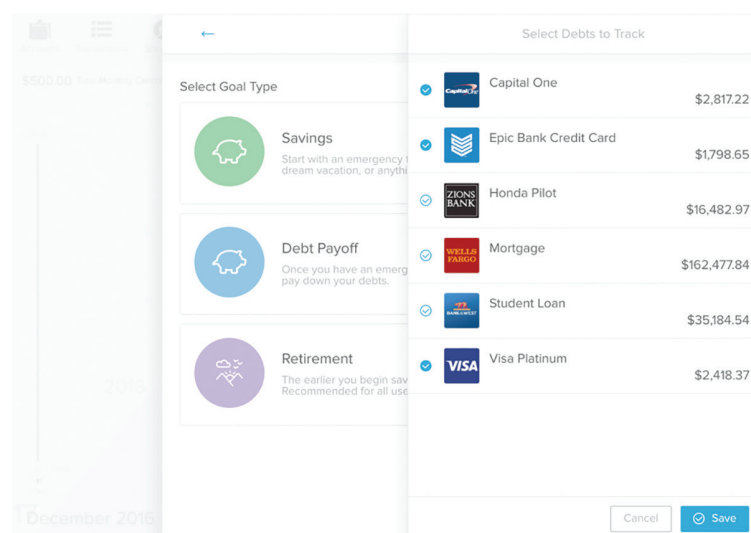5. Select an Account
6. Save

Each goal must be tied to its own account, which will be used to measure your progress towards each goal. You may choose to open new savings accounts in order to set additional goals.
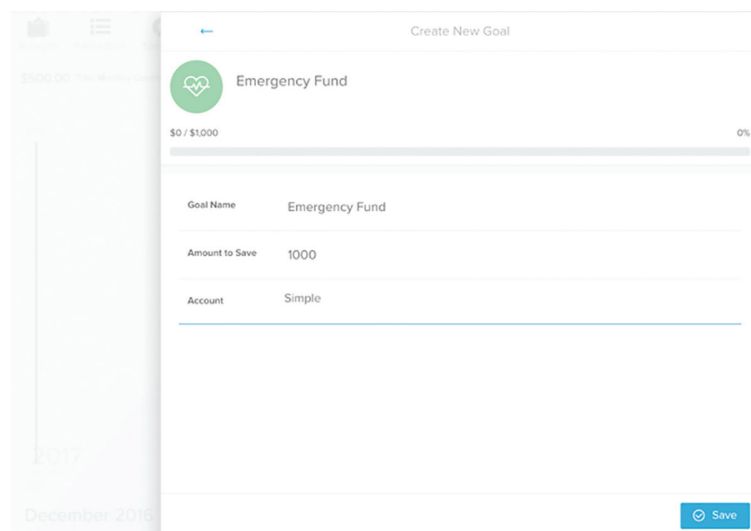
To create a Debt Payoff goal:

1. Select the Debt Payoff Goal Type
2. Select Debts to Track
3. Save

Note that while you can add any debt to the Goals tool, Goals will calculate your payoff based only on the amount you set to contribute in Goals, not accounting for any amount you have budgeted towards that debt in the Budgets tool. Therefore, the Goals tool is best used for unbudgeted debts (usually credit cards), unless you plan to manually adjust your Monthly Goal Contribution to account for budgeted expenses.

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

O

To create a Retirement goal:

1. Select the Retirement Goal Type
1. Specify the Amount to Save
1. Select an Account
1. Save

Manage Goals

The Manage Goals view gives users a quick overview of all current goals and progress towards each. Goals are separated by Type: Debt Payoff, Savings and Retirement. Additionally, the user is able to change the priority of current goals, by dragging a goal to the desired position in the list.