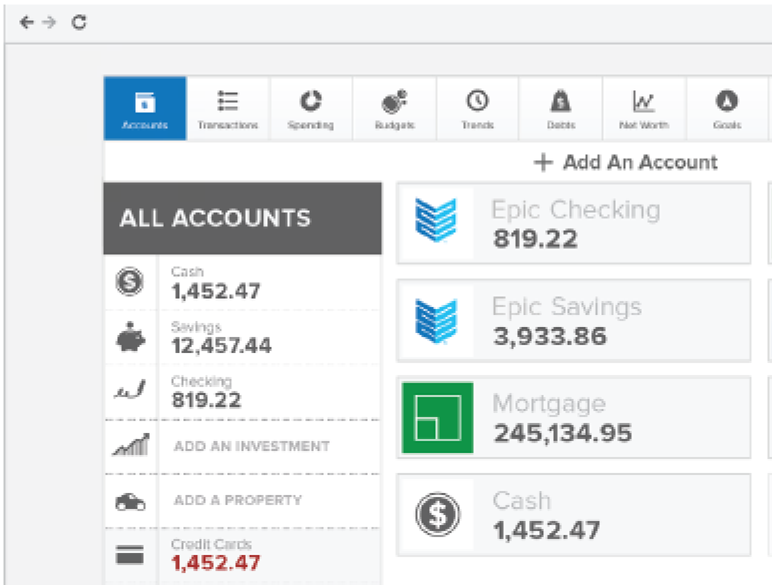
Connex NEW Money Management Tool Features

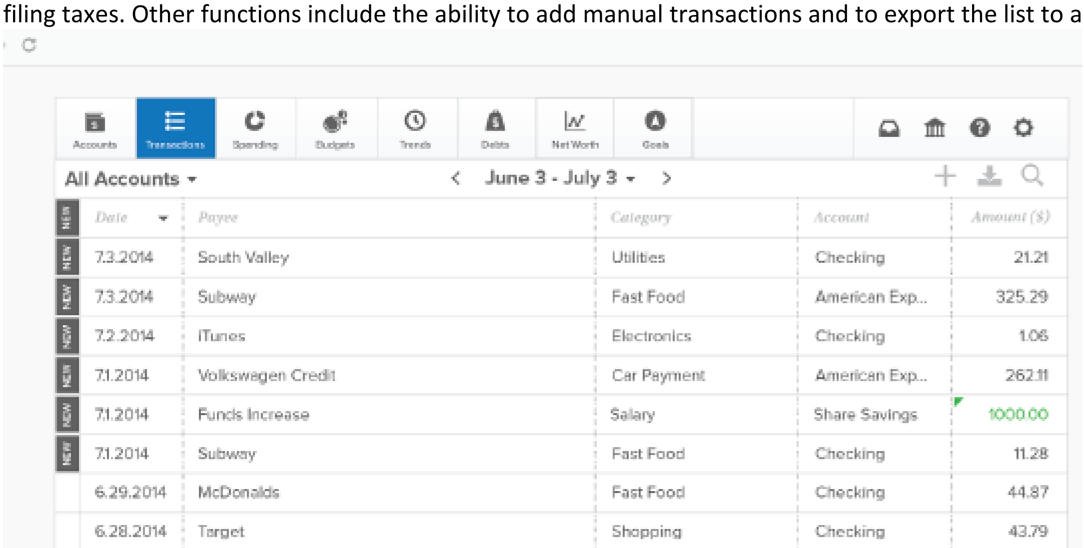
Accounts - A single view of all your internal accounts ('held") and external accounts ("held away").

You will be able to change the account name, account type, interest rate, credit limit, original balance, and account purpose (business or personal). You will also be able manage alerts, exclude the account, mark the account as duplicate, and see the historical balance.

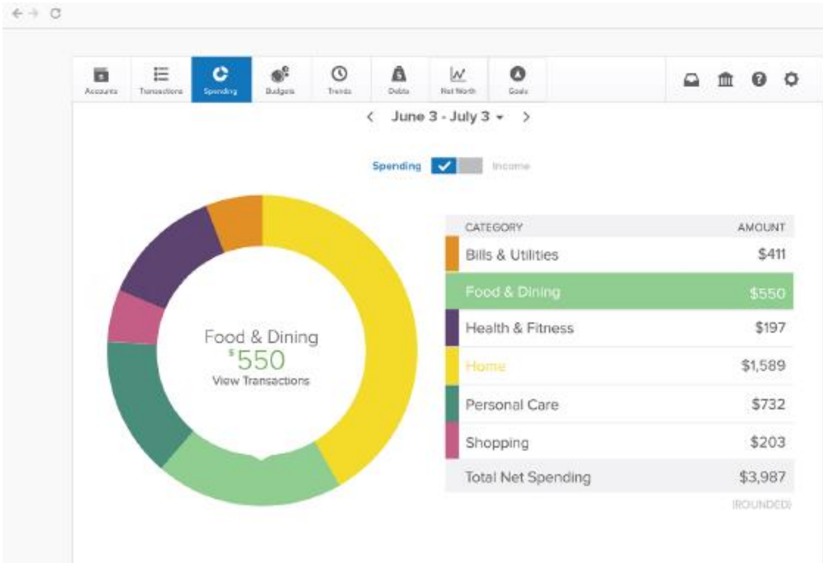


Transactions - An aggregate view of all transactions from internal and external accounts.

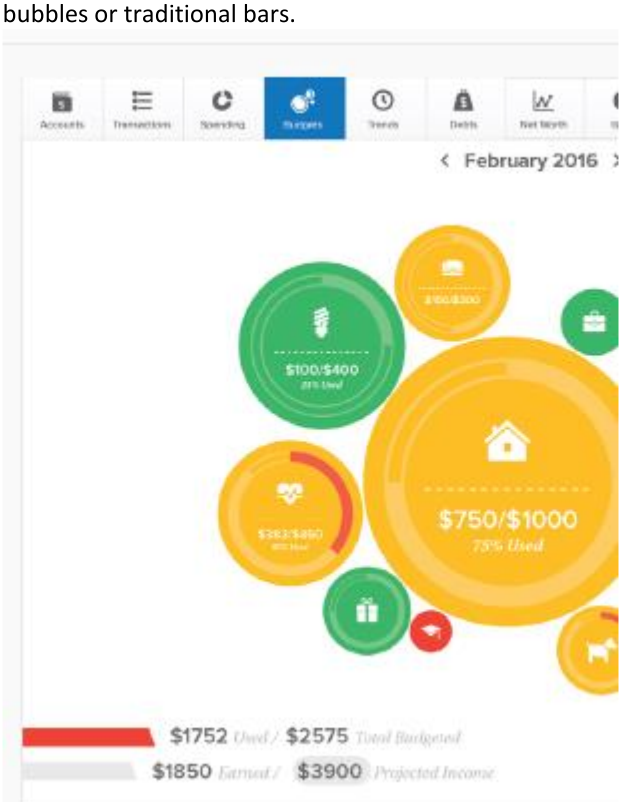
You will be able to filter the view by account or date, as well as search the dataset for any keyword or amount. All of your tax deductible transactions can also be marked throughout the year, and then filtered for easy access while filing taxes. Other functions include the ability to add manual transactions and to export the list to a .csv file.



Spending - A visualization of spending categories over a defined data range.
You will be able to change the date range, view a visualization of income sources, and drill down to sub-categories and transactions.

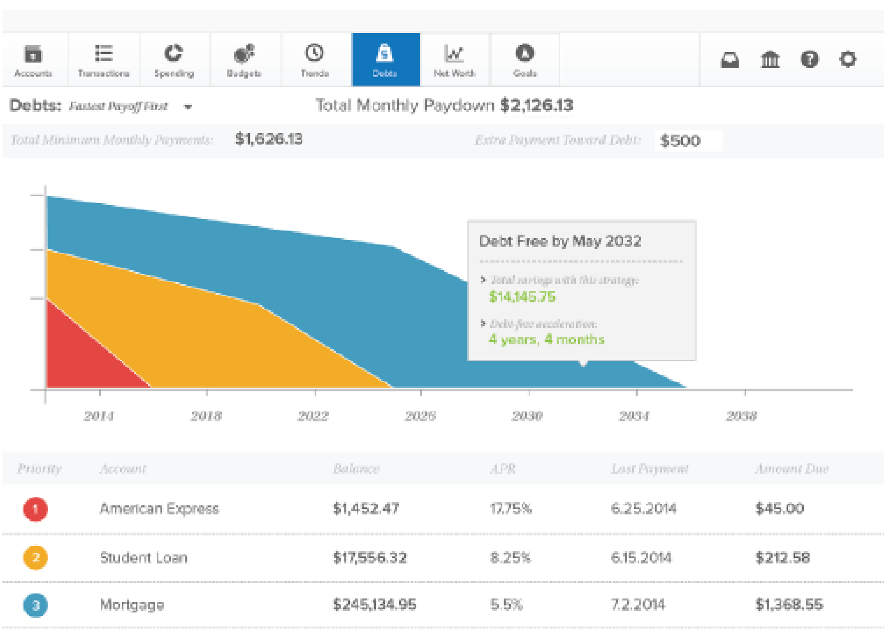


Budgets - A visualization of a user's data on a monthly basis.
You will be able to create custom budget categories, change the amount of money allocated to the monthly budget, view historical monthly budgets, and change the projected income amount. Budgets can be viewed as bubbles or traditional bars.

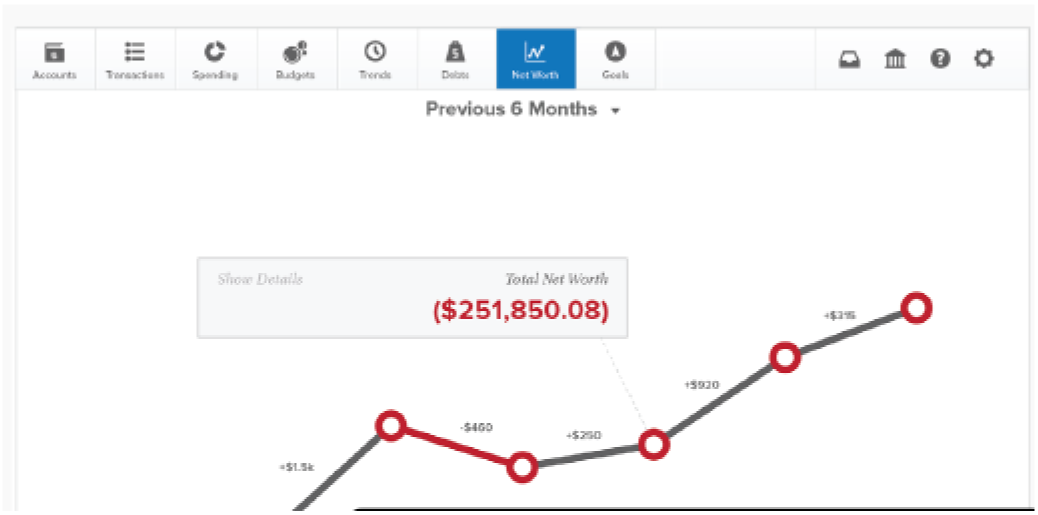


Trends - A visualization of spending over time divided into categories.
This will allow you to drill into subcategory views and see transaction details. You will be able to track income and define the date range over 3, 6, 9 or 12 months.

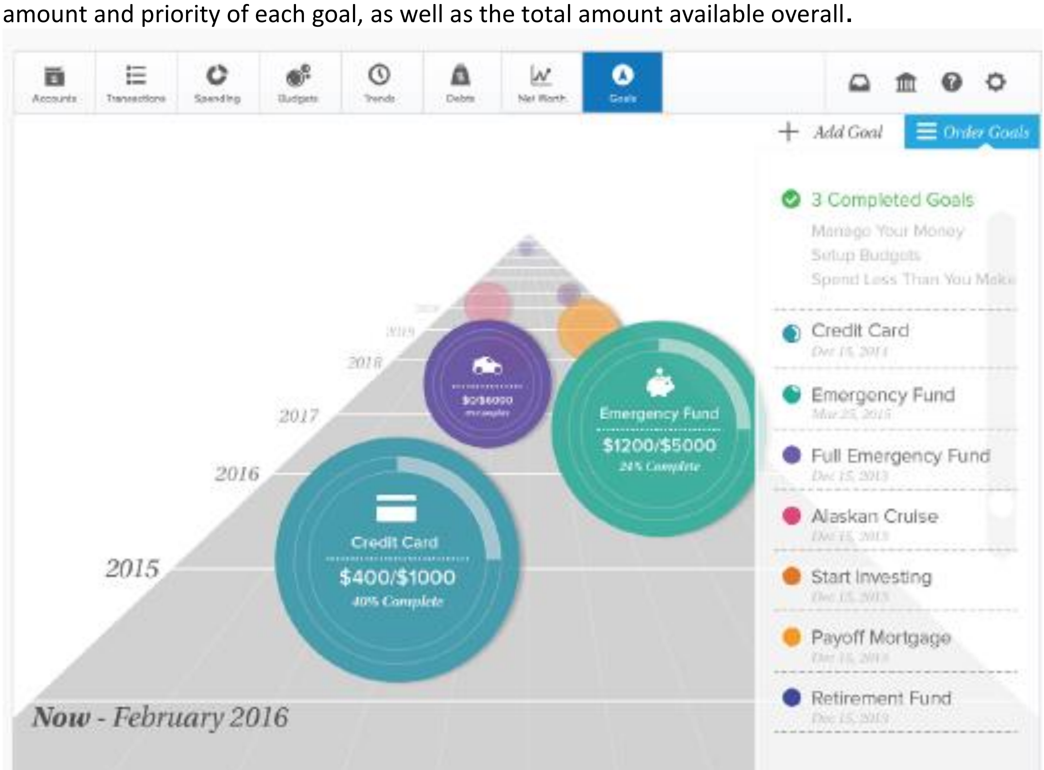
Debts - A tool that enables you to manage a debt plan from your aggregated liability accounts.
You will be able to view balances, APR, last payment date and minimum payment. You will also be able to use this tool to project debt payoff dates and prioritize the payoff of certain debts.



Net Worth - A visualization of your net worth over time.
You will be able to drill into each month and see how certain transactions affect overall net worth.
You will also be able to define the date range over 3, 6, 9 or 12 months.



Goals - A tool that enables users to manage and visualize their goals on a timeline.
Users can create a goal, name it, and associate it with an internal or external account. They can also change the amount and priority of each goal, as well as the total amount available overall.



Alerts - A notification system that can send SMS and/or email messages to you, based on your preferences. Alerts include: Exceeded Budgets, Debt Payment Reminder, Low Account Balance, Large Deposit, Large Expense/Withdrawal and Fee Charged. You will be able define alert thresholds on a per-account and a per-alert basis.