



Asset

by Bank of Cashton



BUBBLE BUDGETS

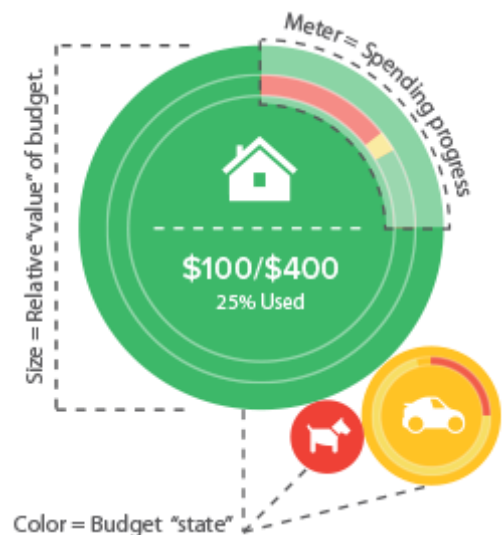
Tell your money to shape up.

Asset delivers a better way to budget. Visualize and interact with your budgets in a more meaningful way - using bubbles!

Since not all budgets are created equal, using circles or "bubbles" to represent budgets allows you to quickly identify budgets that need the most attention.

At a glance, you will be able to determine a budget's:

- State/Status (color)
 - over, under, or near budget
- Relative Value (size)
- Spending Progress (meter)
- Relationship to other budgets



TRANSACTIONS

The Transactions view provides a consolidated list of all transactions from every institution ordered by time. You can create a custom time window by selecting the start and end date. You can also sort and search through your transactions by date, payee, category, account, or amount.

All Accounts						October 14 - November 12		+		-		Q	
Date	Payee	Category	Account	Amount (\$)									
NEW 11.12.2013	Ebay	Shopping	PayPal	25.00									
NEW 11.12.2013	Marleys Sliders	Restaurants	Capital One	11.78									
NEW 11.12.2013	Redbox	Movies & DVDs	Capital One	1.07									
NEW 11.11.2013	In N Out Burger	Fast Food	Acme Finan...	8.68									
NEW 11.11.2013	Los Hermanos	Restaurants	Visa Platinum	26.82									
NEW 11.10.2013	Ross	Clothing	Acme Finan...	28.37									
NEW 11.10.2013	Subway	Fast Food	Visa Platinum	5.39									
NEW 11.9.2013	Amara Day Spa	Hair	Visa Platinum	50.00									
11.9.2013	Bank Fee	Fees & Charges	Acme Finan...	10.00									
11.9.2013	Cafe Rio Orem	Fast Food	Acme Finan...	16.02									
11.9.2013	Harmons - Orem	Groceries	Acme Finan...	29.67									
11.9.2013	Publix	Groceries	Acme Finan...	19.67									
11.9.2013	Supersonic Car Wash	Service & Parts	Capital One	8.00									
11.8.2013	Chevron	Gas	Visa Platinum	43.21									
11.8.2013	Gold's Gym	Gym	Acme Finan...	32.06									

When your transactions are pulled in, they will automatically be categorized. You can go through your transaction history and check that each transaction is categorized correctly. After doing so, your new transactions will automatically categorize more accurately.

EXPENSE TRACKING

Tell your money to make up its mind.

Don't just track spending, know your spending! Get powerful insights on where, when, and how you spend.

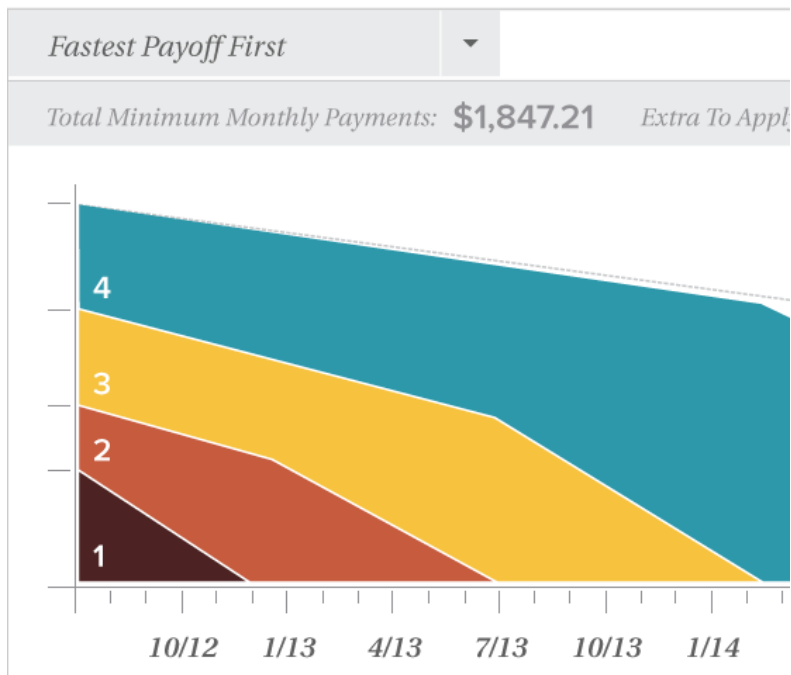
Asset automatically categorizes and tracks spending from all your accounts, so you can see where your money is really going. Unlike other spending pies, Asset reinforces the parent - child relationship of categories, giving you in-depth insights into your spending habits.



DEBT MANAGEMENT

Take control of your financial future.

Asset allows you to create a customized financial plan that fits your lifestyle. It also helps you stay on track with a financial GPS that keeps you on the path to financial freedom and well-being.



An updated data visualization that reflects debt details more accurately - allowing you to quickly see which debts are being paid down and for how long.

At some point in our lives, most of us have borrowed beyond our means. If you're in over your head, Asset is designed to give you step-by-step instructions on how to get out of debt, and stay out for good.

NET WORTH

Get the BIG picture.

The Net Worth app displays data that can be immediately actionable and motivating.

For those users that have a lot of debt and slow changes each month, net worth can be a daunting report. The new Net Worth app shows you a contextually accurate data visualization of your assets vs. liabilities.

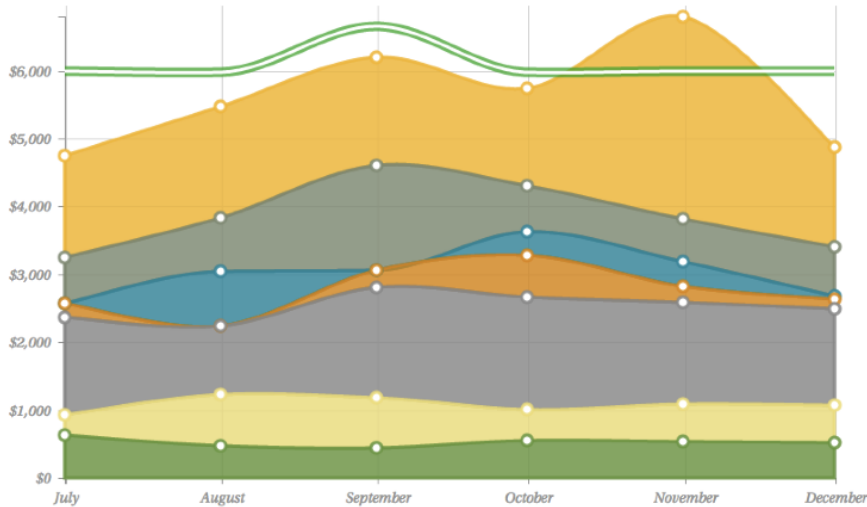


Quickly determine if you are moving in the right direction - and to what degree. Even the smallest changes are easy to see and place in context.

TRENDS

See where your money is going.

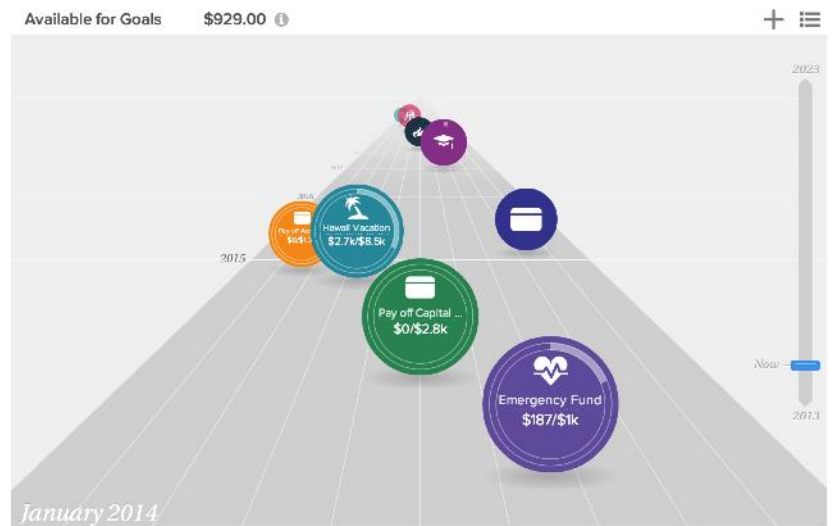
The Trends graph is helpful for those who want to see spending over time. It shows a 6-month history of spending by category along with a green line showing income. This way, you can quickly determine if you are spending more than you are making.



GOALS

Plan for the FUTURE.

The Goals tool helps you plan and visualize long-term financial objectives such as saving for a home. Goals automatically calculates how long it will take to complete each goal and maps it on an interactive timeline, making it easy to see at a glance how close you are to reaching your objectives.



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