

## Transcript for Overview From Centreville Bank

### Overview

#### About the Spending Report

Every month the paychecks come in, and the dollars go out. And you wonder... Where the heck does all that money go? The answer is sitting right in front of you, every time you log in. Right on the homepage... you'll see a colorful pie-chart showing you a breakdown of your spending. At a glance, you can see where the money went... and find places to tighten up your budget. With just a click, you can see the spending details in each category... And start steering your spending in the direction you want to go. So managing your finances becomes a piece of cake... or maybe we should say "a slice of pie".

#### View Spending Report

When you first log in, you'll see a splash of color on the homepage... this is your spending report. The pie chart presents a breakdown of your spending, during the period displayed. It shows only transactions from the account that is selected. To choose the account to display, select it from the drop down menu... to change the date range, use the calendar icons. The larger the color slice in the pie... the more dollars that have been spent on items in that category. You can see details of the transactions included in any category... by selecting it from the list below. All the transactions that have been included in the selected category will be listed.

#### Change Categories

There may be times when you want to assign a different category to a transaction. For example, you purchased motor oil at the supermarket... and you want that purchase to be in an auto related category... instead of groceries. To change the category... locate the transaction you want to change in the list. Note the date and the amount of the transaction. Then close the window. From the menu, go to the account associated with the transaction. From the transactions menu... select all transactions. and locate the item in the list. Click the edit icon. Select the new category, and save the change. That's it. When you return to the homepage...

#### About eStatements

Electronic statements, often called eStatements, are very secure. In fact, since most identity theft occurs through regular mail and improperly discarded paper... electronic statements are recommended by identity theft experts... as a way to better protect your information. And, like paper statements, these can be used for legal proof of payment. You'll also receive electronic statements sooner... because it eliminates delays caused by postal mail delivery.

## **Enroll For eStatements**

Signing up for your electronic statements is easy. In fact, it only takes a couple minutes. And you'll receive your statements faster... and more securely than traditional paper statements. You may be asked to enroll when you log in... or, you can enroll at any time... from here. Select the accounts you want to include. Then verify... or change your email address... where notification will be sent. Finally... accept to the terms of enrollment. That's all it takes. Once you've enrolled for this free service... we'll send an email notifying you... as soon as your statements are ready for viewing.