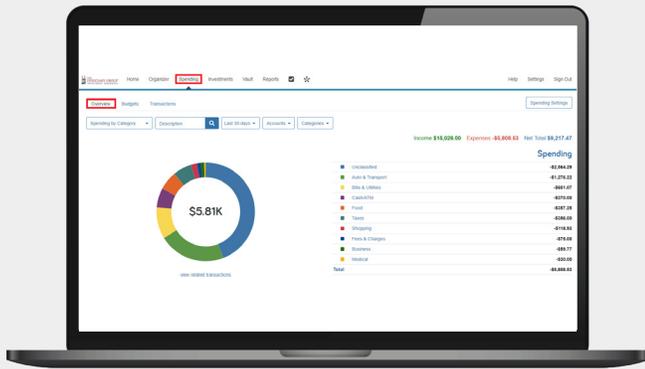


TFG Portal

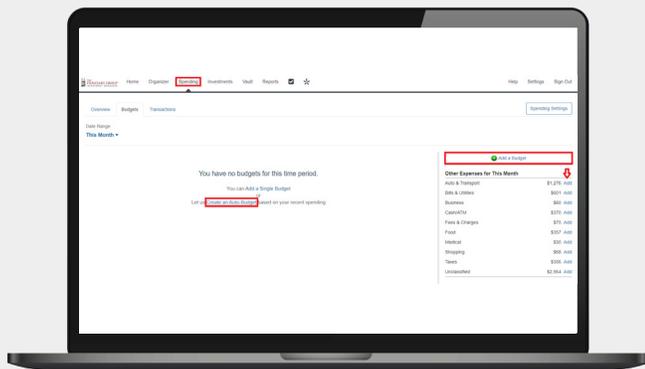
The TFG Portal Spending tab lets you build monthly cash flow schedules and track spending habits on connected accounts. To track and analyze spending, make sure to link your accounts.

You can find the steps to do so [here](#).



OVERVIEW TAB

See spending by category over specific date ranges, accounts, or categories. Click the first dropdown to toggle between Spending by Category, Spending History or Budget History.



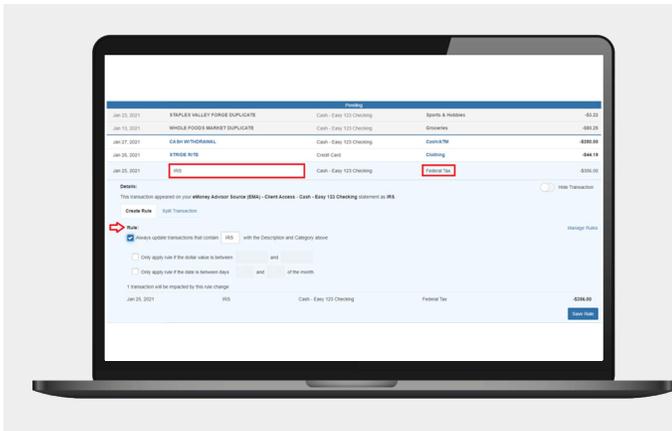
BUDGETS TAB

Create spending categories to help manage expenses. Categories can be created one at a time by clicking **Add** next to expenses on the right or by clicking **Add a Budget**. They can also be created automatically by selecting **Create an Auto-Budget** which uses the past six-month spending average. Once created, monitoring can be done from the **Budget** tab or from **Overview > Budget History**.

Date	Description	Account #	Category #	Amount
Jan 03, 2021	STAPLES VALLEY FORGE DUPLICATE	Cash - Easy 123 Checking	Sparks & Services	\$3.00
Jan 11, 2021	WHOLE FOODS MARKET DUPLICATE	Cash - Easy 123 Checking	Groceries	\$88.01
Jan 17, 2021	EA BY WITHERMAN	Cash - Easy 123 Checking	Contract	\$288.00
Jan 20, 2021	STROK WHITE	Credit Card	Gas/Car	\$64.00
Jan 25, 2021	W	Cash - Easy 123 Checking	Public Fee	\$348.00
Jan 23, 2021	STAPLES VALLEY FORGE	Cash - Easy 123 Checking	Business	\$66.00
Jan 23, 2021	STAPLES VALLEY FORGE	Cash - Easy 123 Checking	Business	\$3.00
Jan 21, 2021	PAYMENT	Cash - Easy 123 Checking	Credit Card Payment	\$1.00
Jan 20, 2021	WALK STORE	Credit Card	Fast Food & Concessions	\$2.00
Jan 15, 2021	CHARONLAF PROTECTION	Cash - Easy 123 Checking	Bank Fee	\$18.00
Jan 17, 2021	COLLEGEVILLE MEDIAN	Cash - Easy 123 Checking	Groceries	\$115.42

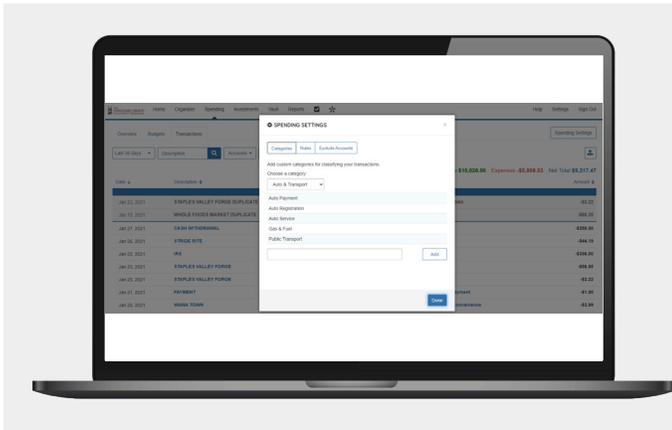
TRANSACTIONS TAB

This displays all transactions from your linked bank accounts. The number of transactions found and the total amount will be displayed at the top of your transactions list.



TRANSACTIONS TAB

To change a transaction Category or Description, click the transaction row and then the **Description** or **Category**. Rules can be created to automatically change the transaction categories by defining rules under the **Rule** section.



SETTINGS TAB

Further manage spending Categories, Rule, and Excluded Accounts as it relates to spending.

Note: If there is an issue connecting your accounts, you'll receive a status message describing the problem. Click on the message to learn how to correct it.

For additional information, visit tfginvest.com/client-portal.