

FinanceWorks Migration to Money Management January 2018



Our eBanking provider NCR will be replacing the FinanceWorks portion of the service with MX Money Management in January of 2018. In preparation for the migration, we have created the following data sheet to better inform you of the differences and features of Money Management. We're excited to see NCR and MX working together to provide the next generation of money management tools.

Items below will be automatically carried over from FinanceWorks to Money Management

- Account information – Name, Type and Balances, etc.
- Transaction Summary – 18 months

Items below will NOT be carried over from FinanceWorks to Money Management

- Outside Account Login Credentials
- Categories
- Goals
- Budgets
- Alerts

Differences between FinanceWorks and Money Management

- Widget on home page – will have different look and feel
- Alert delivery methods - include email and text
- Can set goals for debt payoffs, savings and retirement, including debt forecasting
- Networth is displayed

First Time Users Using Money Management

- You will need to accept the new Terms & Conditions
- You may be prompted to verify your email address
- Click on “Sync” above account list to refresh accounts
- You may need to re-enter outside account login credentials