

*On December 6<sup>th</sup> 2017, FinanceWorks will be replaced with a new product called Money Management. You should see an exciting and innovative way to view all your financial relationships in one place. Here are some of the new features our customers can look forward to:*

- *Improved category-level trends*
- *Debt payoff forecasting*
- *Detailed Net Worth analysis and tracking*
- *Text alerts in addition to email alerts*
- *Improved Auto Categorization*

*Most of your current account information for both hosted and outside accounts will be migrated from FinanceWorks to Money Management; however, there are some limitations that should be noted:*

- *18 months of transaction history for all accounts, assuming you have at least that much transaction history in FinanceWorks.*
- *For security reasons, outside accounts login credentials will not be migrated. You will be instructed to provide login credentials so that accounts will aggregate successfully from that point forward.*
- *Transaction categories will not be migrated. This allows the auto-categorization process to correctly categorize the transactions with more accuracy.*
- *Budgets will also not be migrated; however, Money Management will allow you to use the one-click automatic generation of budgets based on the improved transaction categorization.*