

## HOW TO CREATE OR CLOSE A GOAL ACCOUNT

- Click on 'View all accounts' in your Accounts widget, or choose from the preset Goals categories in the widget at the bottom of your Digital Banking dashboard.

The screenshot shows the ChambersBank digital banking dashboard. The top navigation bar includes 'Home', 'Transfers & Payments', 'Services', 'Settings', 'Messages', and 'Log Out'. The main content area is divided into several sections: 'ACCOUNTS WIDGET' with a 'View all accounts' link circled in yellow; 'PERSONAL FINANCE' with an 'Enroll in Personal Finance' link; and 'GOALS' with three goal categories: 'Save for an emergency', 'Take off on vacation', and 'Save for a new ride', all circled in yellow.

- Select the Goals tab, then select 'Create Goal.'

The screenshot shows the 'Manage Accounts' page. The 'Goals' tab is selected and circled in yellow. Below the tabs, there is a 'Create a Goal' section with the text 'Making saving a breeze. Set aside money and track your financial goals.' and a 'Create Goal' button circled in yellow.

- Fill in the form fields to customize your Goal, then select 'Save goal.'

The screenshot shows a form titled "Customize your goal" with a close button (X) in the top right corner. The form contains the following fields and options:

- Category:** A dropdown menu with "Automobile" selected.
- Goal account name:** A text input field containing "My automobile".
- Amount you want to save:** A text input field with a dollar sign (\$) on the left and "15,000.00" on the right.
- Goal target date:** A date picker field showing "02/06/2027".
- Agreement:** A checked checkbox with the text "I agree to the terms in the [Truth in Savings Disclosure](#)".
- Buttons:** A grey "Cancel" button and a green "Save goal" button, which is circled in yellow.

- Choose how often you would like to transfer funds into the new Goal account, then select 'Continue.'

The screenshot shows a "Success" confirmation screen with a close button (X) in the top right corner. It features a green checkmark icon and the following text:

**Congratulations, you've just created your goal, My automobile!**

Now, let's set up a recurring or one-time transfer.  
You will need to save at least **\$288.47 per week** in order to meet your goal of **\$15,000.00** by **February 6, 2027**.

**Frequency:** A dropdown menu with "Weekly - \$288.47" selected.

- Goals accounts are FDIC insured
- Access the money any time, immediately
- Transfer funds to and from this account at any time

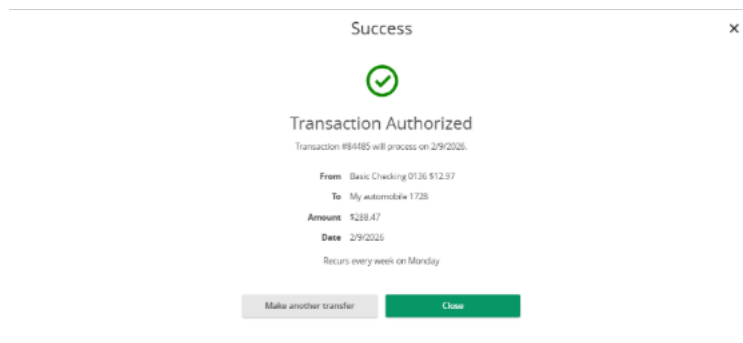
A green "Continue" button is circled in yellow at the bottom of the screen.

- Fill out the form to set up automatic transfers into your new Goal account. Verify the information, then select 'Submit transfer.'

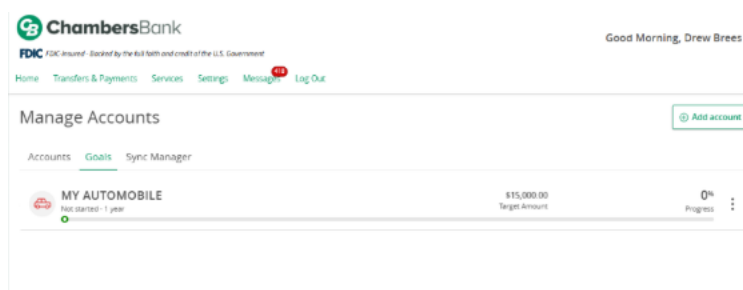
The screenshot shows a "Funds Transfer" form with a close button (X) in the top right corner. It contains the following fields and options:

- From Account:** A dropdown menu with "Basic Checking 0136 \$12.97" selected.
- To Account (must exist):** A text input field containing "My automobile".
- Amount:** A text input field with a dollar sign (\$) on the left and "288.47" on the right.
- Frequency:** A dropdown menu with "Weekly" selected.
- Day of the week:** A dropdown menu with "Monday" selected.
- Start date:** A date picker field showing "02/06/2026".
- End date:** A date picker field showing "02/06/2027".
- Buttons:** A grey "Maybe later" button and a green "Submit transfer" button, which is circled in yellow.

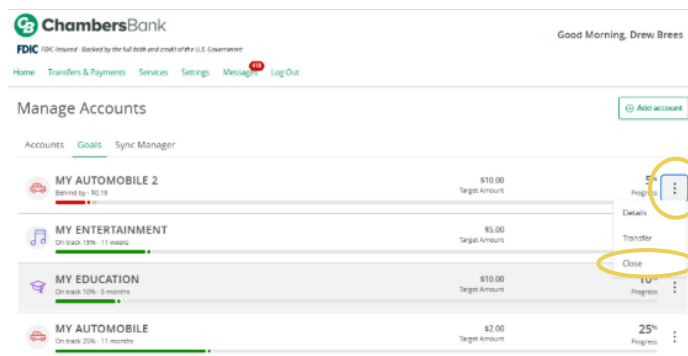
- You will receive confirmation that your recurring transfer is set up.



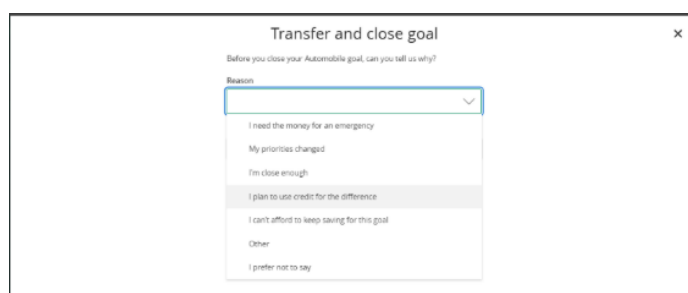
- When you close the window, your new Goals Account should now be listed in the Goals tab.



- You can close a Goals account at any time. Simply click the ellipsis on the account you wish to close, then select 'Close.'



- Select a reason for closing the account.



- Select an account you wish to deposit the Goal funds into.

### Transfer and close goal

You have \$0.50 plus interest accrued to date in your goal. Select the account you want the money transferred to. We will close the goal once the transfer is complete.

Any scheduled transfer(s) connected to this account will be canceled.

Deposit Account

Mo Money 9922 \$1.03

Basic Checking 0136 \$10.22


Green Checking 9930 \$0.02

Green Checking 9948 \$0.01

Green Checking 1 0738

- You will receive confirmation that your recurring Goal has been closed and your funds have been transferred.

### Transfer and close goal



Thank you! We have closed My automobile 2 and transferred \$0.50 to Basic Checking 0136 \$10.22. Keep up the great work and start saving towards another goal.

[Not now](#) [Create a new goal](#)