

# Personal Financial Management (PFM) Preview

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My Accounts
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## External links

- [Credential Direct®](#)
- [Qtrade Investor](#)
- [Collabria Financial](#)

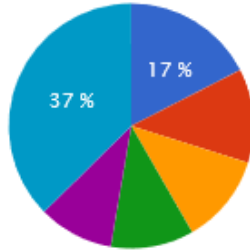
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## Messages

You have [1 uncategorized transaction\(s\)](#). Categorize them for a more complete financial picture.

## Spending Analysis ?

Top spending categories for [All accounts](#) for [This month](#)



### Category

■ [Mortgages](#)

■ [Travel](#)

■ [Education](#)

■ [ATM/Cash Withdrawals](#)

■ [Loans](#)

■ [All other spending](#)

### Spent Budget % ?

\$1,075.00

\$765.60

\$730.00

\$676.03

\$612.94

\$2,301.53

[Configure Categories](#)  
You have excluded one category

You spent \$730.00 on Education, \$230.00 more than your budget.

[View Spending & Trends](#) | [Manage Budgets](#)

## Accounts Summary

### Momentum Credit Union Accounts

#### Membership

Account	Balance	Action
<a href="#">Chequing-Savings</a>	\$1,075.00	<input type="button" value="v"/>
<a href="#">High Interest</a>	\$3,850.00	<input type="button" value="v"/>
<a href="#">Mortgage</a>	\$426,196.99	<input type="button" value="v"/>
<a href="#">TFSA Variable</a>	\$16,030.25	<input type="button" value="v"/>

Link External Accounts

[External Accounts](#) ? + [Link an external account](#)

Link external accounts held at other financial institutions.

[Assets and Liabilities](#) ? + [Add value of house, vehicle or cash](#)

Add Assets and Liabilities

#### Assets

Account	Balance	Action
Car	\$20,000.00 <small>from today</small>	<input type="button" value="v"/>
House	\$500,000.00 <small>from today</small>	<input type="button" value="v"/>

#### Liabilities

Account	Balance	Action
Loan to Mom	\$6,500.00 <small>from today</small>	<input type="button" value="v"/>

View your Net Worth

**Total: \$108,258.26** ?