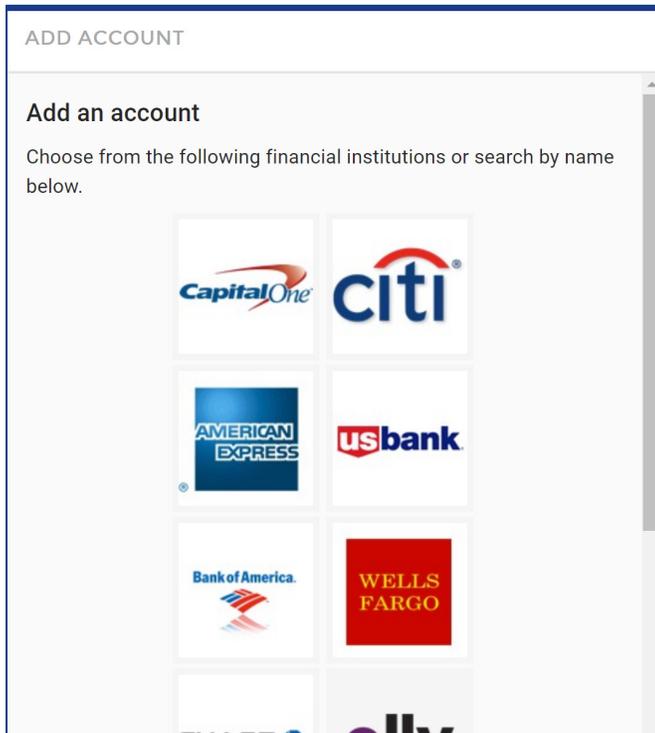


Kish TotalView Quick Start Guide



ADD AN ACCOUNT

Easily link your accounts from other financial institutions for a complete financial picture.

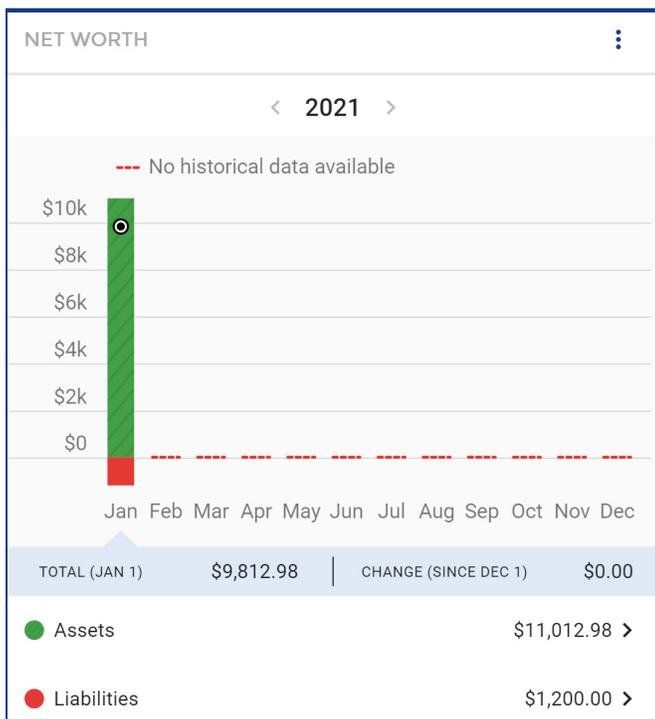
Step 1: Navigate to My Accounts and click the plus sign to "Add New Account"

Step 2: Select an institution or use the search to find your institution.

Step 3: Enter the required credentials and select "Connect" to add the account.

Please note that Kish credit cards must be linked by searching "Elan Card." Kish Financial Solutions accounts are currently not linkable.

 You may find that some other accounts, such as Discover, are unavailable. This is due to that institution's decision not to allow external access to customer data.



NET WORTH

Net Worth gives a complete overview of your assets and liabilities. Your Kish Bank accounts will display automatically, and other accounts will display after being linked.

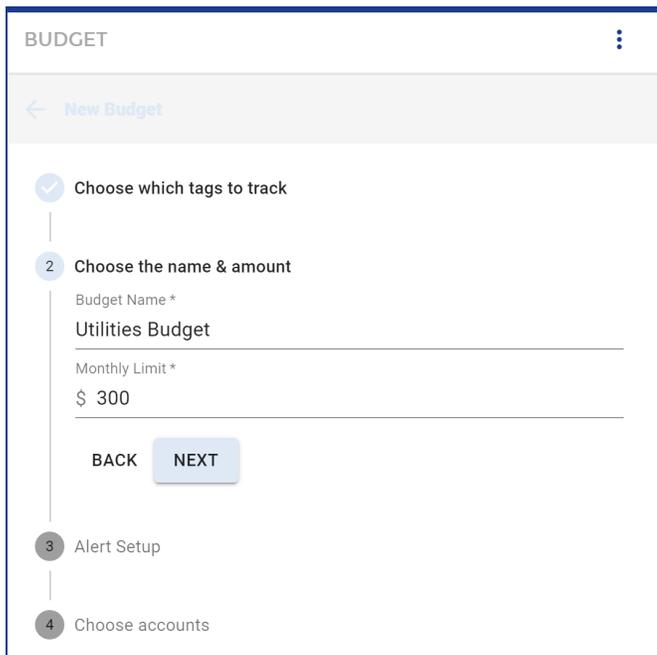
You can also add assets and liabilities manually without linking to a financial institution.

Step 1: Click the plus sign at the bottom of Net Worth.

Step 2: Select "Add Asset" or "Add Liability."

Step 3: Enter a name and amount for the asset or liability.

Step 3: Click "Save" to add the asset or liability.



BUDGETS

Setting budgets helps keep your spending on track. Users can select "View Insights" for guidance on what to budget based on spending history before adding a new budget.

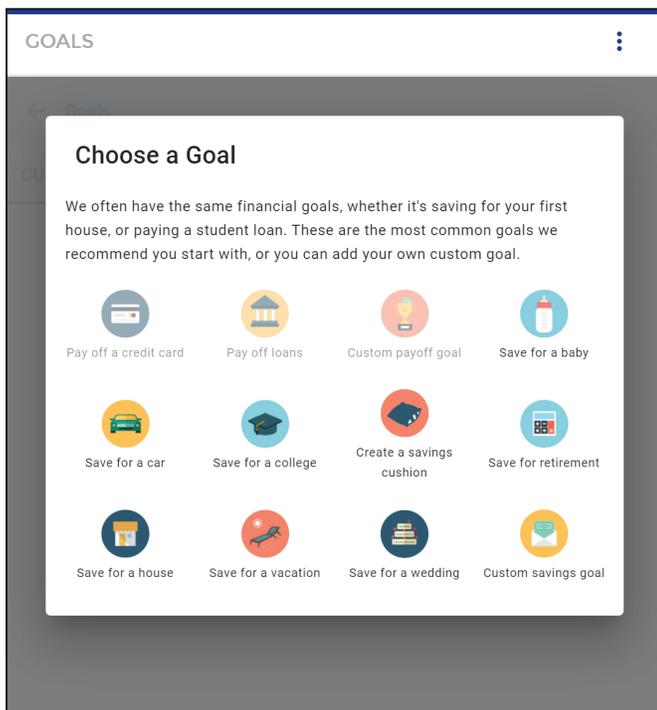
Step 1: Navigate to Budgets and select "Add Budget."

Step 2: Select the tag (spending category) you would like to track.

Step 3: Enter a name and monthly limit, set up an optional alert, and choose accounts to monitor.

Step 4: Click "Finish" to add the new budget.

Select a budget and click "Edit Budget" to edit or delete.



GOALS

Create savings goals, like saving for a vacation or a house, or a debt reduction goal, like paying off a loan or a credit card.

Step 1: Navigate to Goals and select "Add Goal."

Step 2: Select your desired savings or pay-off goal.

Step 3: Fill in the required information for your goal.

Step 4: Click "Save" to add the new goal.

Your Goal Summary will update the completion date and amount needed per month according to your preferences. Goals will automatically update your progress and will reflect your day-to-day account balances in TotalView.

Questions? Contact our Client Solutions Center at 1-800-981-5474.



1-800-981-5474
www.KishBank.com