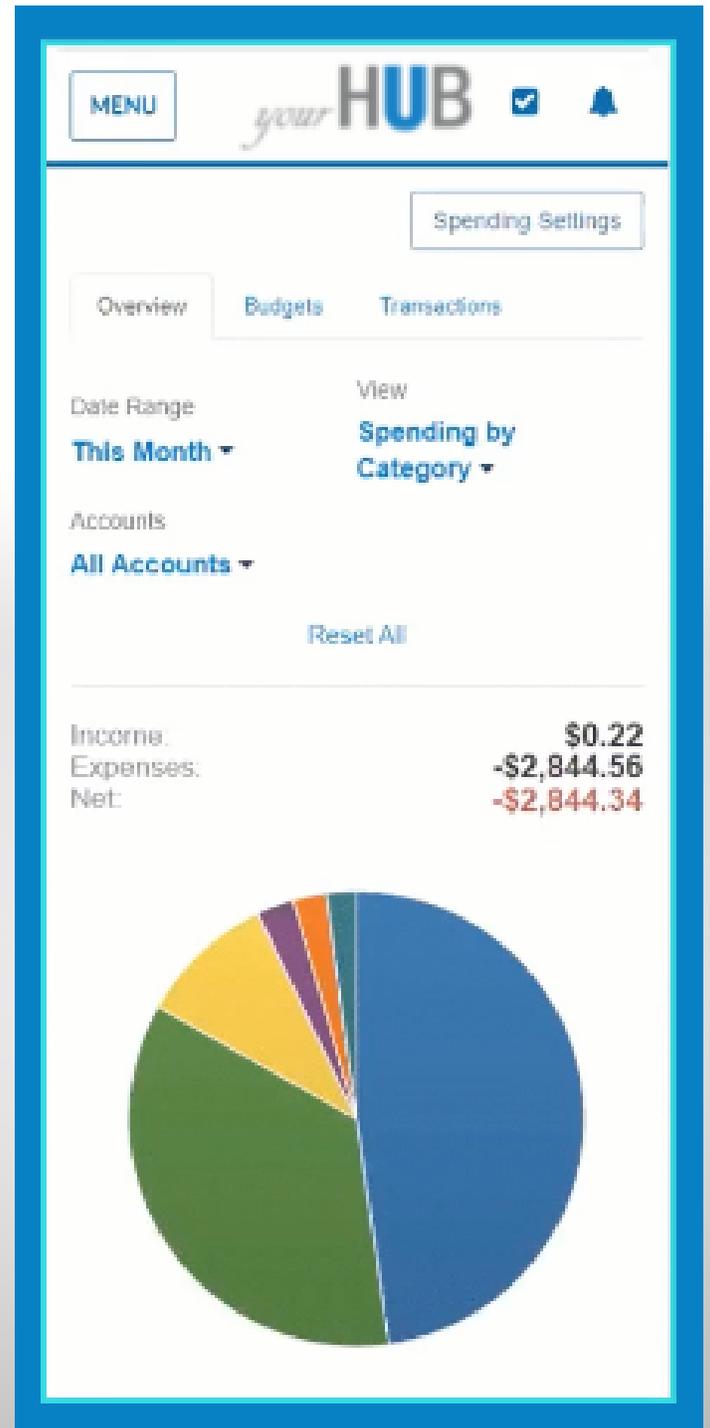
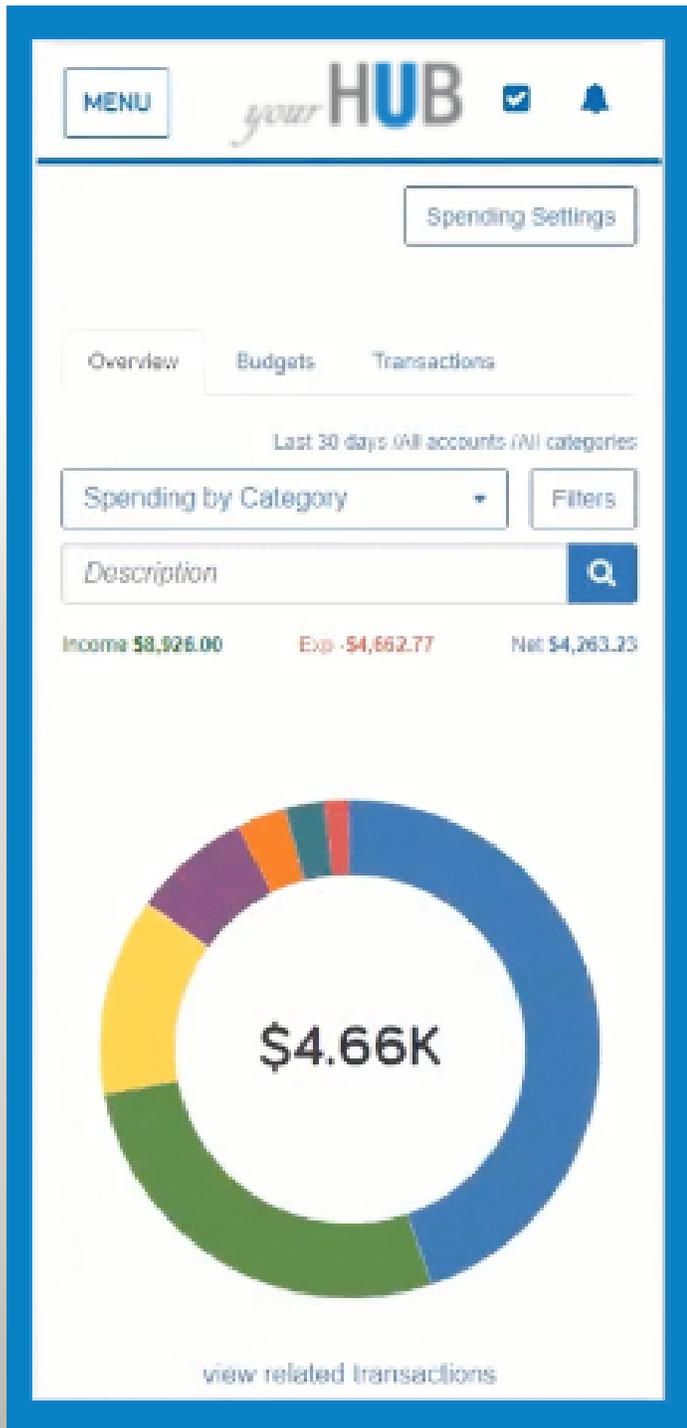


# *your* HUB Spending and Budgeting Enhancements

Your HUB is a feature financial planning clients at Blumark receive. If you are unsure if you have access to this tool please reach out to [youradvisor@blumarkadvisors.com](mailto:youradvisor@blumarkadvisors.com) or call 248.289.1647.

Building on last year's updates, we've added even more improvements to *your* HUB Spending and Budgeting tools. With improved charts, filtering, and performance, this update streamlines the client experience on desktop and mobile platforms.



## What's new to the Spending Overview page:

- The chart and categories table has a more modern and responsive design.
- Multi-select functionality is now available in the Categories filter.
- Filter settings are retained across pages within Spending and Budgeting.

Also, we've adjusted the Transactions page format to improve readability and streamline access to essential information. As you can see below, the transactions no longer require scrolling to see all the necessary information, and Pending Transactions are placed automatically at the top of the list.

The screenshot shows the 'your HUB' interface. At the top left is a 'MENU' button. The logo 'your HUB' is in the top center, with a checkmark and a bell icon to its right. A 'Spending Settings' button is in the top right. Below the header are three tabs: 'Overview', 'Budgets', and 'Transactions'. The 'Transactions' tab is active. Below the tabs are filters for 'Date Range' (set to 'Last 30 Days'), 'Accounts' (set to 'All Accounts'), and 'Categories' (set to 'All Categories'). A search bar labeled 'Search for transactions' is below the filters, with a magnifying glass icon. A 'Reset All' button is centered below the search bar. An 'Export Results' button is on the left side. Below the filters, the summary shows 'Transactions Found: 34' and 'Total Amount: \$8,542.23'. A table of transactions follows, with columns for 'Date', 'Description', and 'Account'. The table lists five transactions from 15, 2020 to 19, 2020.

Date	Description	Account
19, 2020	CASH WITHDRAWAL	Easy 123 Ch...
18, 2020	STRIDE RITE	*****
17, 2020	IRS	Easy 123 Ch...
15, 2020	STAPLES VALLEY F...	Easy 123 Ch...
15, 2020	STAPLES VALLEY F...	Easy 123 Ch...

While workflow improvements to search and categories and search make it easier than ever for you to find and update the transactions you need.

Transaction Data *your HUB* X

Account used  
\*\*\*\*\*Card

Value  
-\$44.19 Split Transaction

Description  
STRIDE RITE

Category  
Clothing Change

Details:  
This transaction appeared on your eMoney - localhost - \*\*\*\*\*Card statement as STRIDE RITE.

Hide Transaction

Rule: [Manage Rules](#)

Always update transactions that contain STRIDE RITE with the Description and Category above

Only apply rule if the dollar value is between and

Only apply rule if the date is between days and of the month.

Cancel Save

Category Select *your HUB* X

auto

**Auto & Transport**

- Auto Payment
- Auto Registration
- Auto Service
- Gas & Fuel
- Public Transport

**Insurance**

- Auto Insurance

Cancel Select

MENU *your HUB* [check] [bell]

Transaction successfully updated

Export Last 30 days / All accounts / All categories

Search by description [search] Filters

Income \$8,926.00 Exp -\$4,662.77 Net \$4,263.23

Pending

MAY 15	STAPLES VALLEY FORGE D... Sports & Hobbies	-\$3.22
MAY 05	WHOLE FOODS MARKET D... Groceries	-\$80.25

2020

MAY 18	STRIDE RITE Auto & Transport	-\$44.19
MAY 17	IRS Unclassified	-\$356.00
MAY 13	PAYMENT Unclassified	-\$1.00
MAY 12	WAWA TOWN Groceries	-\$3.99
MAY 11	OVERDRAFT PROTECTION Bank Fee	-\$75.00
MAY 09	COLLEGEVILLE WEGMANS Groceries	-\$111.42
MAY 09	INTEREST PAYMENT Interest Income	\$0.22
MAY 07	PORSCHE FINANCIAL SER... Auto Service	-\$638.11

MAY 07 MAMBA AMAZON.COM

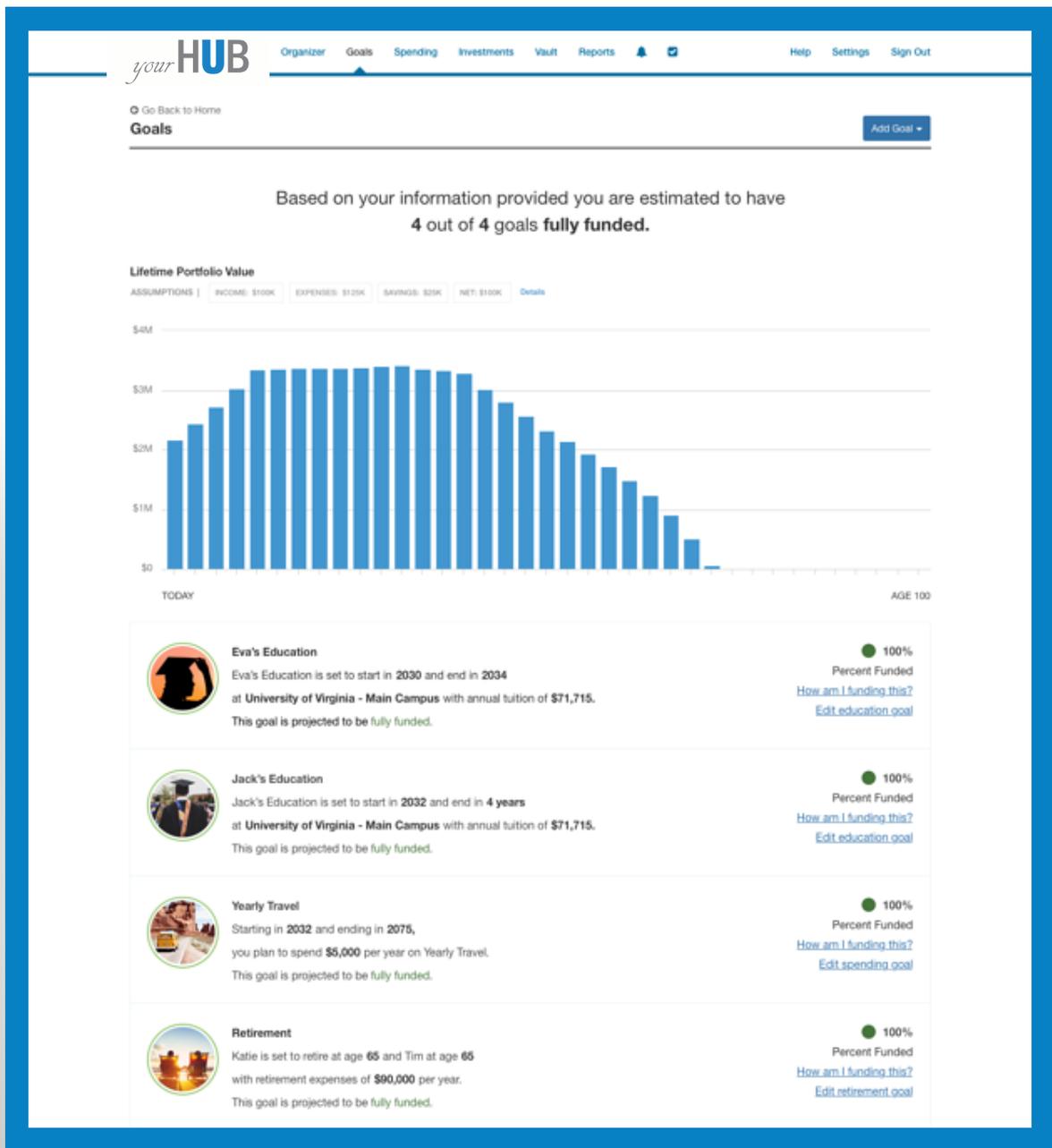
Stay tuned for more updates to our Spending and Budgeting tools later this year!

# A More Efficient Goals Experience in *your* HUB

As we continue to enhance *your* HUB with interactive experiences, we are redesigning the **Goals Page** to provide you with a more personalized and streamlined experience.

## What's Changing on the Goals Page:

This enhancement is designed to provide a consistent experience between the advisor and client planning tools. Also, the new Goals page allows you to simply and efficiently view all goal details on a single page.



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