

Stay Aware with Alerts

Your Personal Financial Website provides timely alerts to notify you of important changes to your accounts and investments, important dates, and reminders too!

The screenshot shows a dark-themed notification bar at the top with the text "FINANCIAL ALERT" and a red circle containing the number "4". To the right of the bar is a "MANAGE ALERTS" link. Below the bar is a list of four alerts, each with a title, a description, and a date "Jun 17".

Alert Title	Description	Date
LARGE EXPENSE	\$1,800 (Norwegian Cruise Lines) was charged to your Bank of America Discover Card account.	Jun 17
LARGE EXPENSE	\$1,200 (SunTrust Mortgage Payment) was charged to your TD Bank Checking account.	Jun 17
INVESTMENT ACTIVITY	\$193 (Buy of \$193.48 to Brinker Mod-Aggressive ETF) in your Principal Financial 401(k) Plan.	Jun 17
BUDGET EXCEEDED	\$350 spending in June is over your budget of \$1,800.	Jun 17



Wherever You Go

Whether via email, or on the home screen of your Mobile Personal Financial Website, alerts help you stay in-the-know, wherever you go.



Avoid Fees

Save money by being alerted to low cash balances and unexpected bank fees.



Respond Quicker

Alerts for high credit balance, large expense, and budget exceeded allow you to quickly respond to unusual account activity.



Always Remember

Be reminded of upcoming events like birthdays and anniversaries. Also be alerted to important financial dates like social security benefits, required minimum distributions, and tax filing dates.

Set up your Alerts now!

1. Log on to your Personal Financial Website.
2. Click on Manage Alerts in the Financial Alerts Bar, or click on Settings in the top right corner of your Home Page.
3. Your email address is already added for you to receive email alerts. You can add additional Email Recipients too.
4. Turn on the Alerts you prefer and set the criteria for each.