

Take charge of your budgeting and financial planning with ease. Our Insights solution offers powerful budgeting tools, allowing you to set and track your financial goals effortlessly. By having a holistic view of your income, expenses, and savings, you can create realistic budgets, track your progress, and make adjustments as needed.

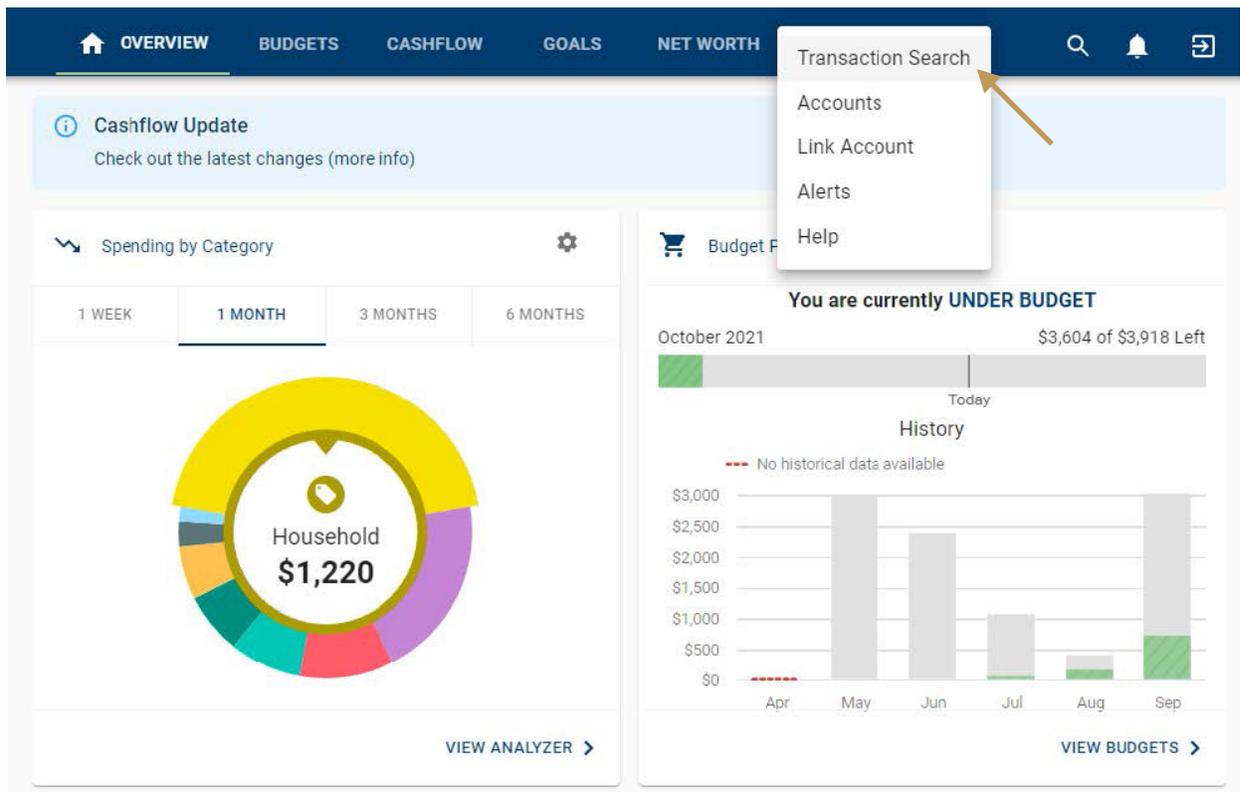
While Insights will not move your money for you, it will make suggestions and give you the alerts you need to help reach your goals.

Index

1. Tagging a Transaction
2. Adding a Budget
3. Adding Goals
4. Adding External Accounts, Assets and Liabilities, and Net Worth
5. Using the Cashflow Calendar
6. Adding Viewable Accounts
7. Spending by Category
8. Creating Alerts

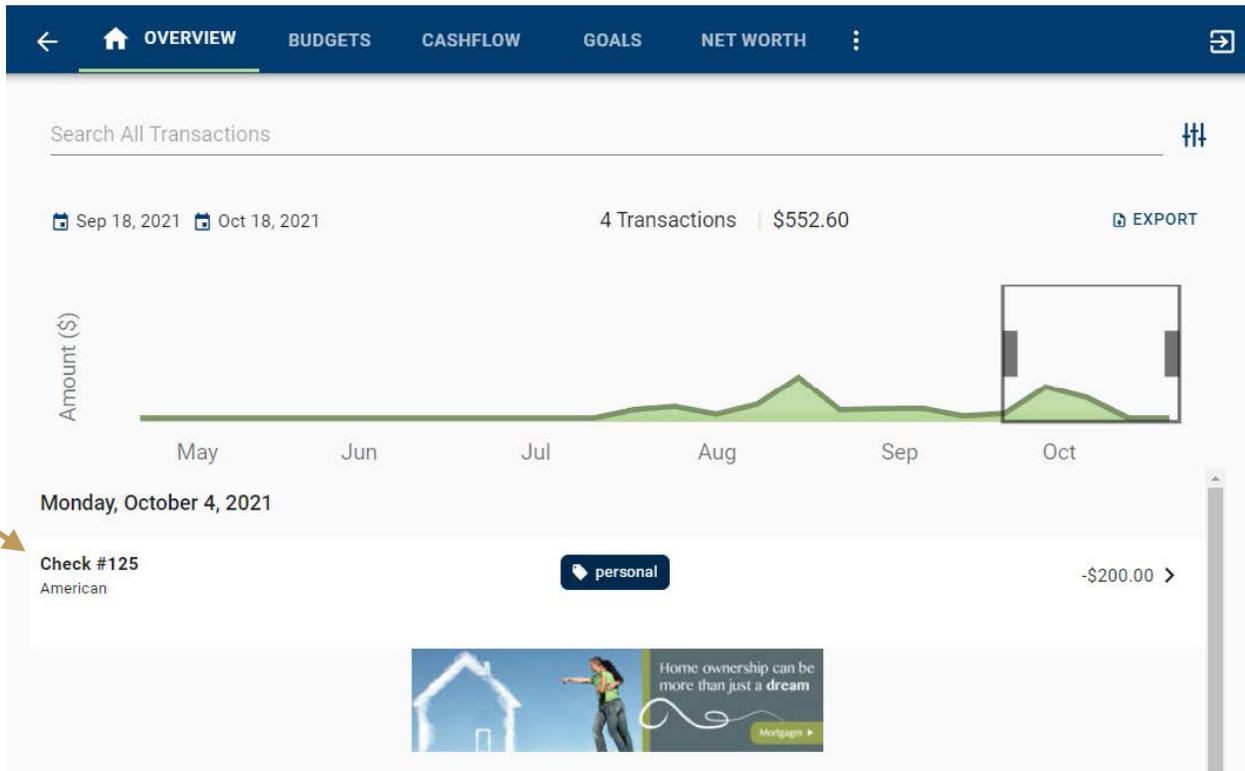
How to Tag a Transaction

Step 1: Navigate to PFM and select the *View Analyzer* button on your dashboard, or choose the ellipsis (three dots) on the toolbar to select *Transaction Search*.



The screenshot displays the Keystone Bank PFM dashboard. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A search icon, notification bell, and share icon are on the right. A dropdown menu is open, showing options: 'Transaction Search', 'Accounts', 'Link Account', 'Alerts', and 'Help'. An arrow points to 'Transaction Search'. Below the navigation, there's a 'Cashflow Update' section with a 'more info' link. The main area is split into two panels. The left panel, 'Spending by Category', shows a donut chart for 'Household' with a total of '\$1,220' and a 'VIEW ANALYZER >' button. The right panel, 'Budget P...', shows a progress bar for 'October 2021' with '\$3,604 of \$3,918 Left' and a 'Today' marker. Below this is a 'History' bar chart for months from April to September, with a note 'No historical data available' and a 'VIEW BUDGETS >' button.

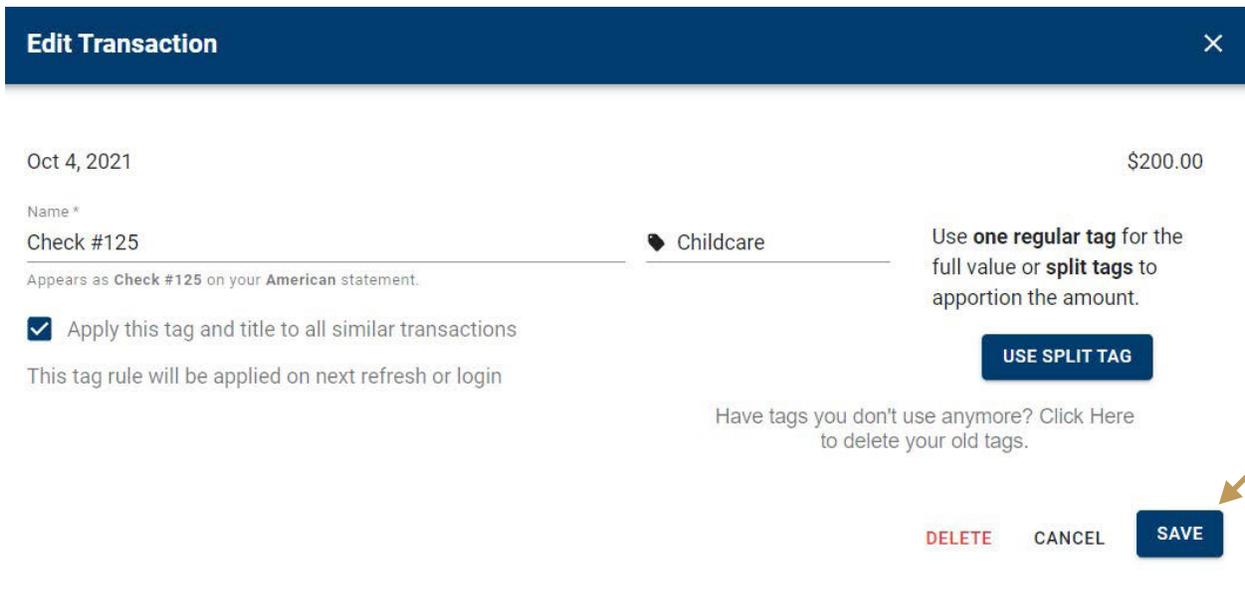
Step 2: Locate and select the transaction you want to tag or modify.



The More You Know: Our PFM feature auto-tags all incoming transaction and analyzing each individual merchant and vendor. While we do our best, no one knows your spending habits better than you. We allow you to update and customize your transactions to your own needs.

Step 3: On the *Edit Transaction* screen, you can modify the naming convention used to identify the transaction, update the *Category* or *Tag* assigned to one of your choice, and apply the tag and title adjustments to all similar transactions. When necessary, you may also use the *Split Tag* button to split the transaction among multiple categories. Lastly, this screen will allow you to delete/remove the transaction from PFM.

Step 4: Select Save.



Edit Transaction ✕

Oct 4, 2021 \$200.00

Name*
Check #125 📌 Childcare

Appears as Check #125 on your American statement.

Apply this tag and title to all similar transactions
This tag rule will be applied on next refresh or login

Use **one regular tag** for the full value or **split tags** to apportion the amount.

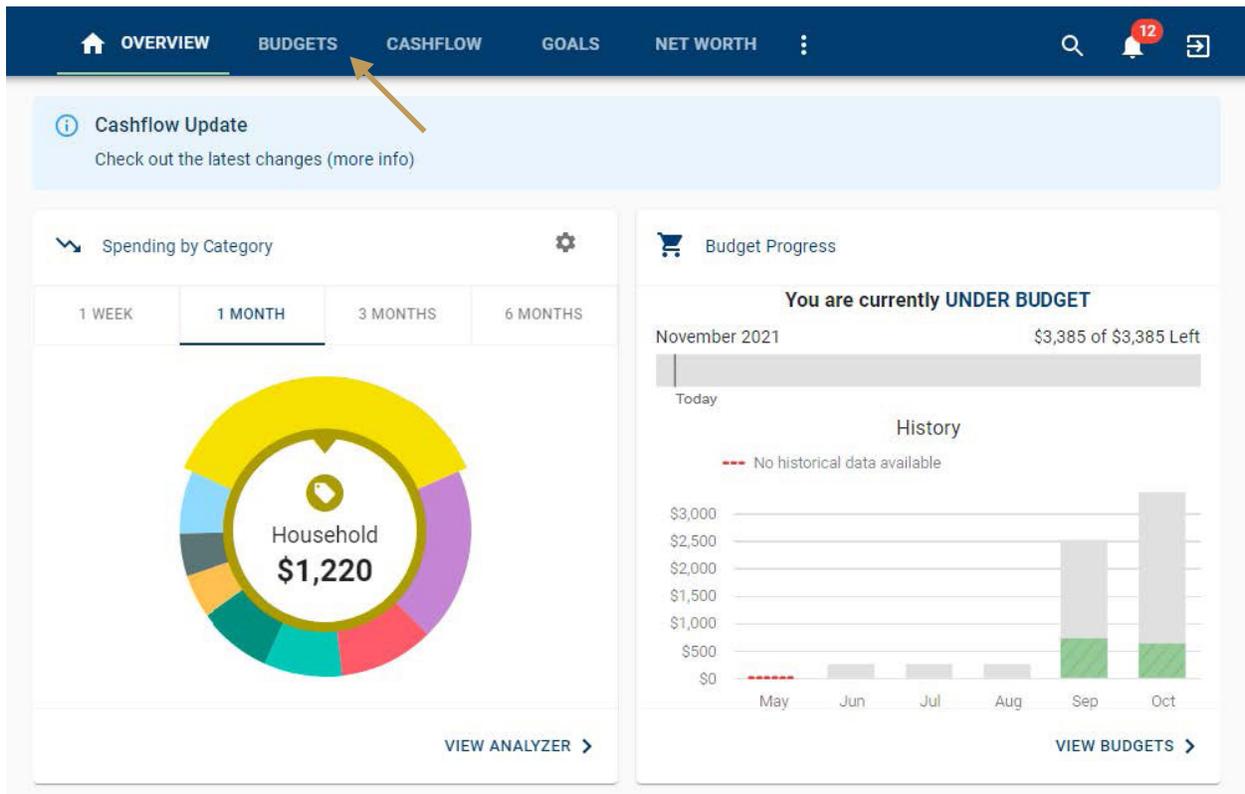
USE SPLIT TAG

Have tags you don't use anymore? [Click Here](#) to delete your old tags.

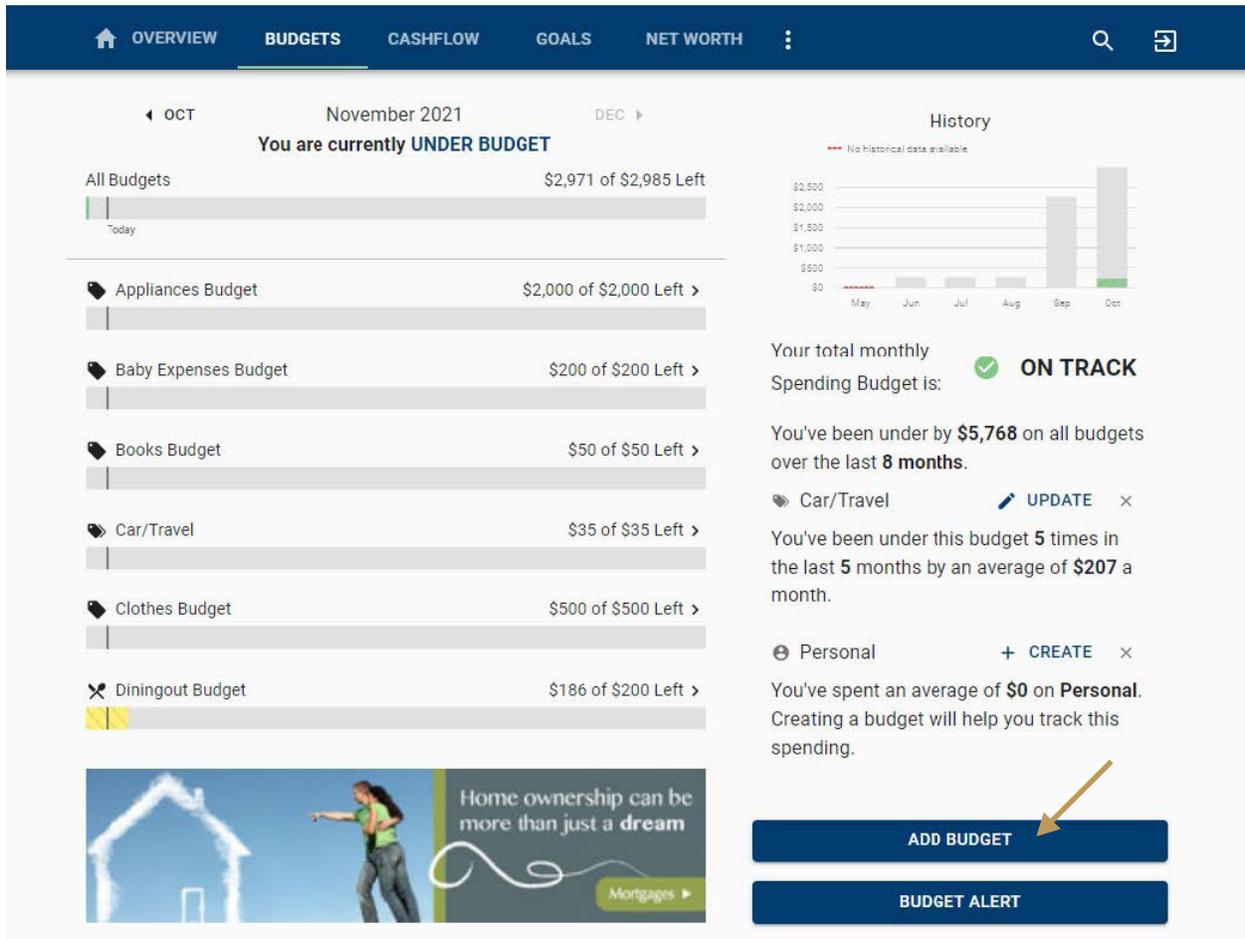
DELETE **CANCEL** **SAVE**

How to Add a Budget

Step 1: Navigate to PFM and select the *View Budgets* button on your dashboard, or choose the *Budgets* tab on the toolbar.



Step 2: Select *Add Budget*.



← OCT November 2021 DEC ▶

You are currently UNDER BUDGET

All Budgets \$2,971 of \$2,985 Left

Today

- Appliances Budget \$2,000 of \$2,000 Left >
- Baby Expenses Budget \$200 of \$200 Left >
- Books Budget \$50 of \$50 Left >
- Car/Travel \$35 of \$35 Left >
- Clothes Budget \$500 of \$500 Left >
- Diningout Budget \$186 of \$200 Left >

History

No historical data available

Your total monthly Spending Budget is: **ON TRACK**

You've been under by **\$5,768** on all budgets over the last **8 months**.

Car/Travel UPDATE ×

You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.

Personal + CREATE ×

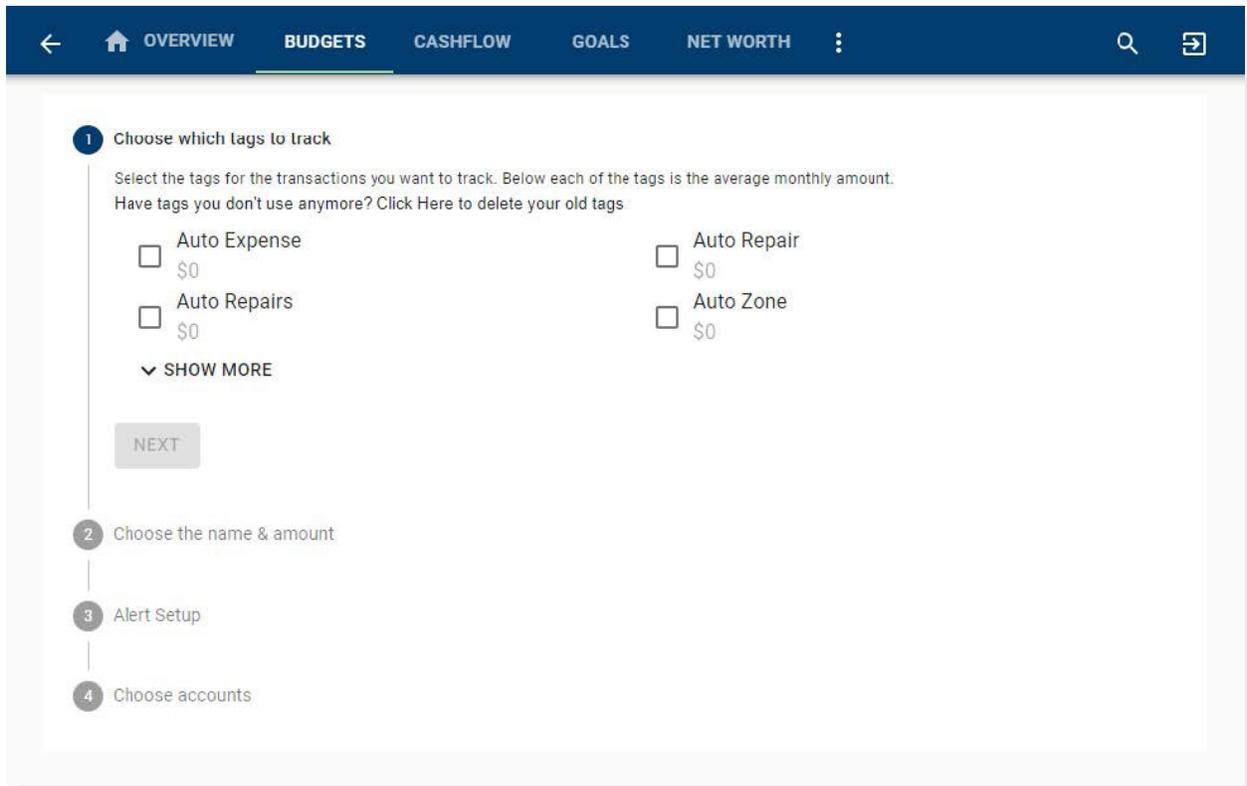
You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

ADD BUDGET

BUDGET ALERT

The More You Know: The *Budgets* tab also allows you to view and modify existing Budgets. You can adjust the tag associated with each budget you've created, increase/decrease budget amounts, rename, and even delete a budget by clicking on the appropriate one.

Step 3: Complete steps 1-4 on the screen by choosing which tag to track, establishing the name and budget amount, enrolling in alerts, and selecting which accounts to use for tracking your budget.



The screenshot shows a mobile application interface for budgeting. At the top is a dark blue navigation bar with a home icon, a back arrow, and menu items: OVERVIEW, BUDGETS (highlighted), CASHFLOW, GOALS, and NET WORTH. There are also search and share icons on the right. Below the navigation bar is a white content area with a vertical progress indicator on the left showing four steps: 1. Choose which tags to track (active), 2. Choose the name & amount, 3. Alert Setup, and 4. Choose accounts. The main content area contains the following text and options:

1 Choose which tags to track

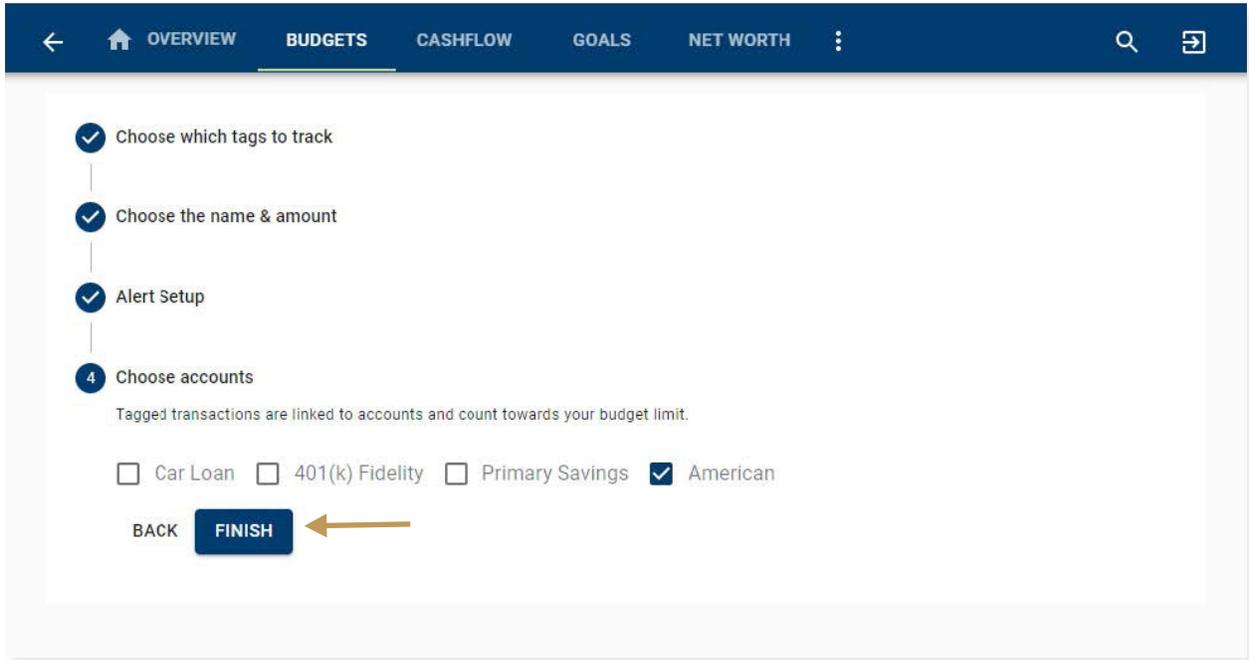
Select the tags for the transactions you want to track. Below each of the tags is the average monthly amount.
Have tags you don't use anymore? [Click Here to delete your old tags.](#)

<input type="checkbox"/> Auto Expense \$0	<input type="checkbox"/> Auto Repair \$0
<input type="checkbox"/> Auto Repairs \$0	<input type="checkbox"/> Auto Zone \$0

▼ SHOW MORE

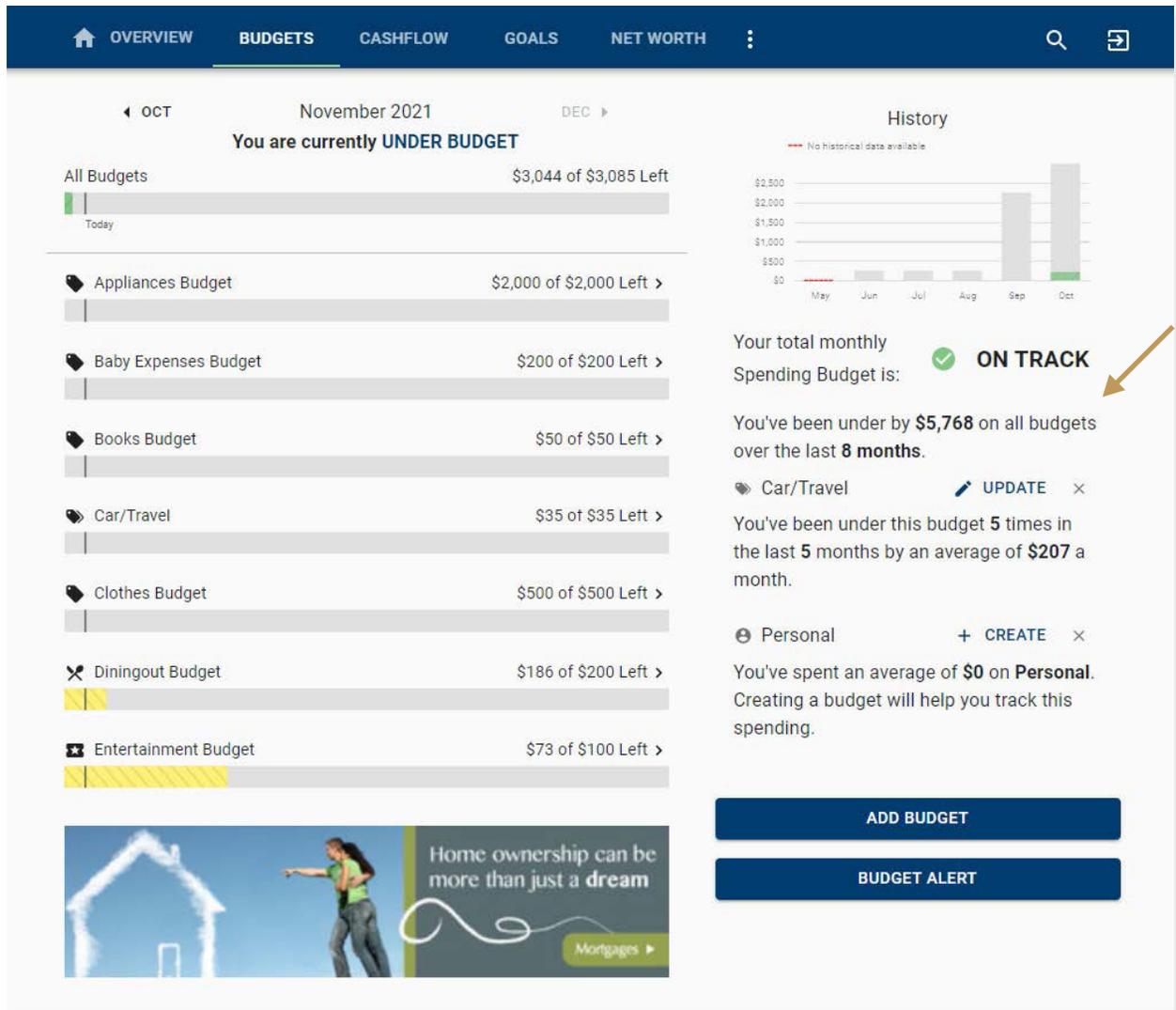
NEXT

Step 4: Select *Finish*.



The screenshot shows a mobile application interface for budgeting. At the top is a dark blue navigation bar with a home icon, a back arrow, and menu items: OVERVIEW, BUDGETS (highlighted), CASHFLOW, GOALS, and NET WORTH. There are also search and share icons on the right. Below the navigation bar is a vertical list of four steps, each with a checkmark icon: 'Choose which tags to track', 'Choose the name & amount', 'Alert Setup', and '4 Choose accounts'. The '4 Choose accounts' step is active. Below this step, there is a sub-header 'Choose accounts' and a note: 'Tagged transactions are linked to accounts and count towards your budget limit.' Underneath, there are four checkboxes: 'Car Loan', '401(k) Fidelity', 'Primary Savings', and 'American'. The 'American' checkbox is checked. At the bottom of the form, there are two buttons: 'BACK' and 'FINISH'. A yellow arrow points to the 'FINISH' button.

Step 5: Use *Budget Insights* to help meet your financial targets. Insights allows you to easily adjust your plans by using spending history to provide suggestions for staying on track.



OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH

← OCT **November 2021** DEC →

You are currently UNDER BUDGET

All Budgets \$3,044 of \$3,085 Left

Today

- Appliances Budget \$2,000 of \$2,000 Left >
- Baby Expenses Budget \$200 of \$200 Left >
- Books Budget \$50 of \$50 Left >
- Car/Travel \$35 of \$35 Left >
- Clothes Budget \$500 of \$500 Left >
- Diningout Budget \$186 of \$200 Left >
- Entertainment Budget \$73 of \$100 Left >

History

No historical data available

History chart showing spending from May to October. Spending is zero from May to August, then increases in September and October.

Your total monthly Spending Budget is: ON TRACK

You've been under by **\$5,768** on all budgets over the last **8 months**.

- Car/Travel UPDATE ×
You've been under this budget **5** times in the last **5** months by an average of **\$207** a month.
- Personal + CREATE ×
You've spent an average of **\$0** on **Personal**. Creating a budget will help you track this spending.

ADD BUDGET

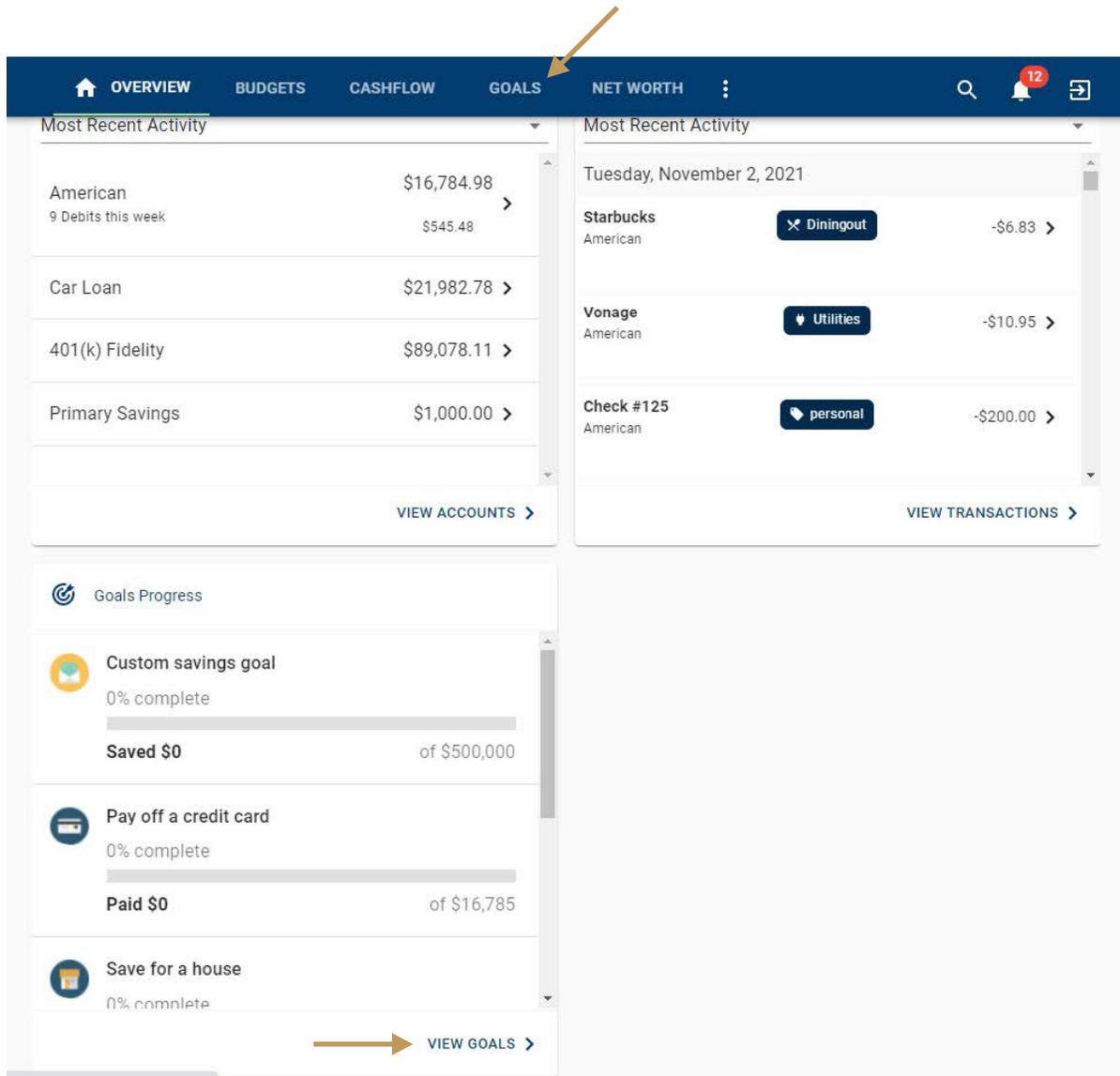
BUDGET ALERT

Home ownership can be more than just a dream

Mortgages ▶

How to Add a Goal

Step 1: Navigate to PFM and select the *View Goals* button on your dashboard or choose the *Goals* tab on the toolbar.



The screenshot displays the Keystone Bank PFM dashboard with the 'GOALS' tab selected in the top navigation bar. An orange arrow points to the 'GOALS' tab. The dashboard is divided into two main sections: 'Most Recent Activity' and 'Goals Progress'.

Most Recent Activity (Left Panel):

Account	Balance
American	\$16,784.98
Car Loan	\$21,982.78
401(k) Fidelity	\$89,078.11
Primary Savings	\$1,000.00

Most Recent Activity (Right Panel):

Tuesday, November 2, 2021

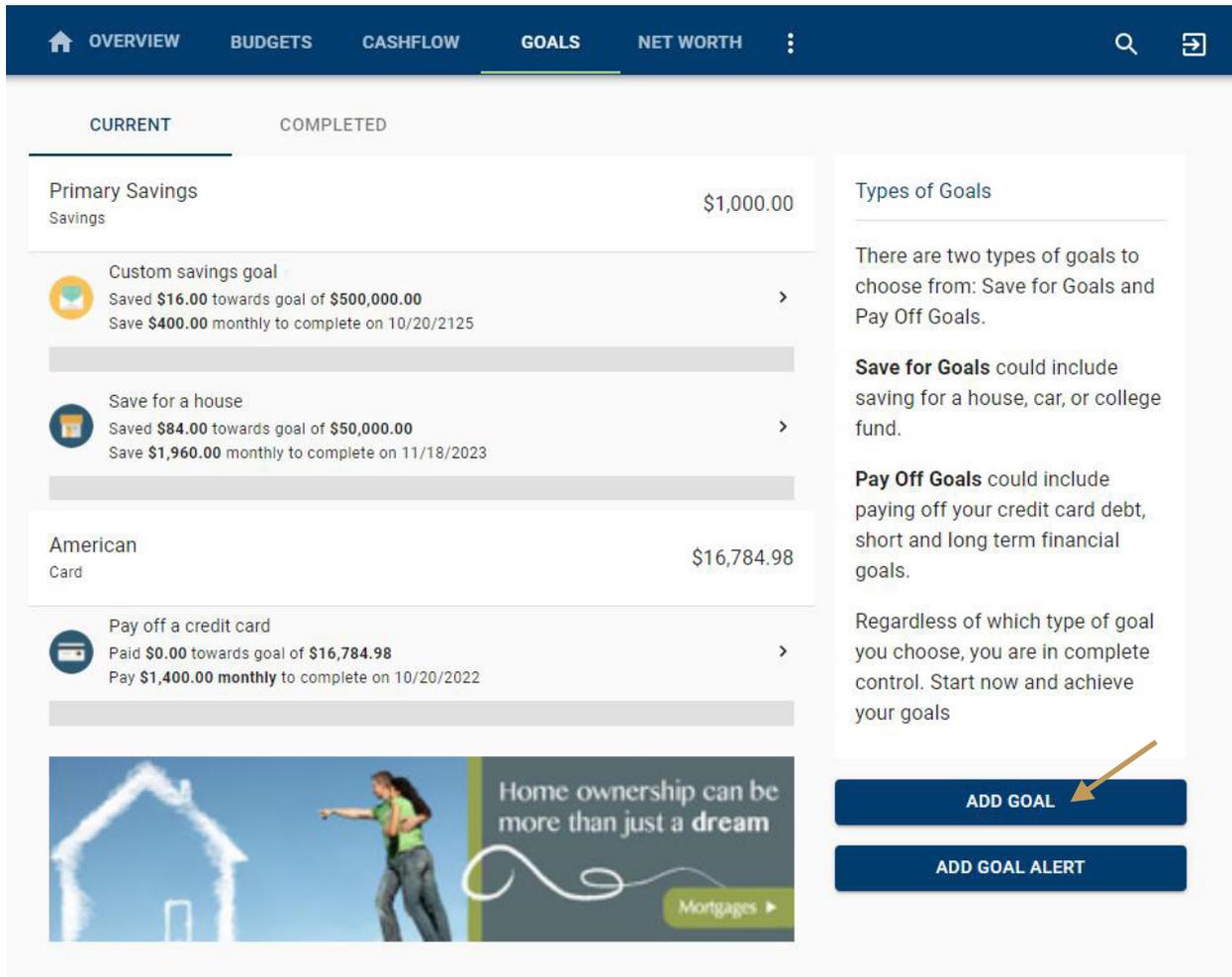
Transaction	Category	Amount
Starbucks	Diningout	-\$6.83
Vonage	Utilities	-\$10.95
Check #125	personal	-\$200.00

Goals Progress (Bottom Left Panel):

- Custom savings goal:** 0% complete. Saved \$0 of \$500,000.
- Pay off a credit card:** 0% complete. Paid \$0 of \$16,785.
- Save for a house:** 0% complete.

A 'VIEW GOALS' button with an orange arrow is located at the bottom of the 'Goals Progress' panel.

Step 2: Select *Add Goal*.



CURRENT **COMPLETED**

Primary Savings \$1,000.00
Savings

Custom savings goal
Saved **\$16.00** towards goal of **\$500,000.00**
Save **\$400.00** monthly to complete on 10/20/2125

Save for a house
Saved **\$84.00** towards goal of **\$50,000.00**
Save **\$1,960.00** monthly to complete on 11/18/2023

American \$16,784.98
Card

Pay off a credit card
Paid **\$0.00** towards goal of **\$16,784.98**
Pay **\$1,400.00** monthly to complete on 10/20/2022

Types of Goals

There are two types of goals to choose from: Save for Goals and Pay Off Goals.

Save for Goals could include saving for a house, car, or college fund.

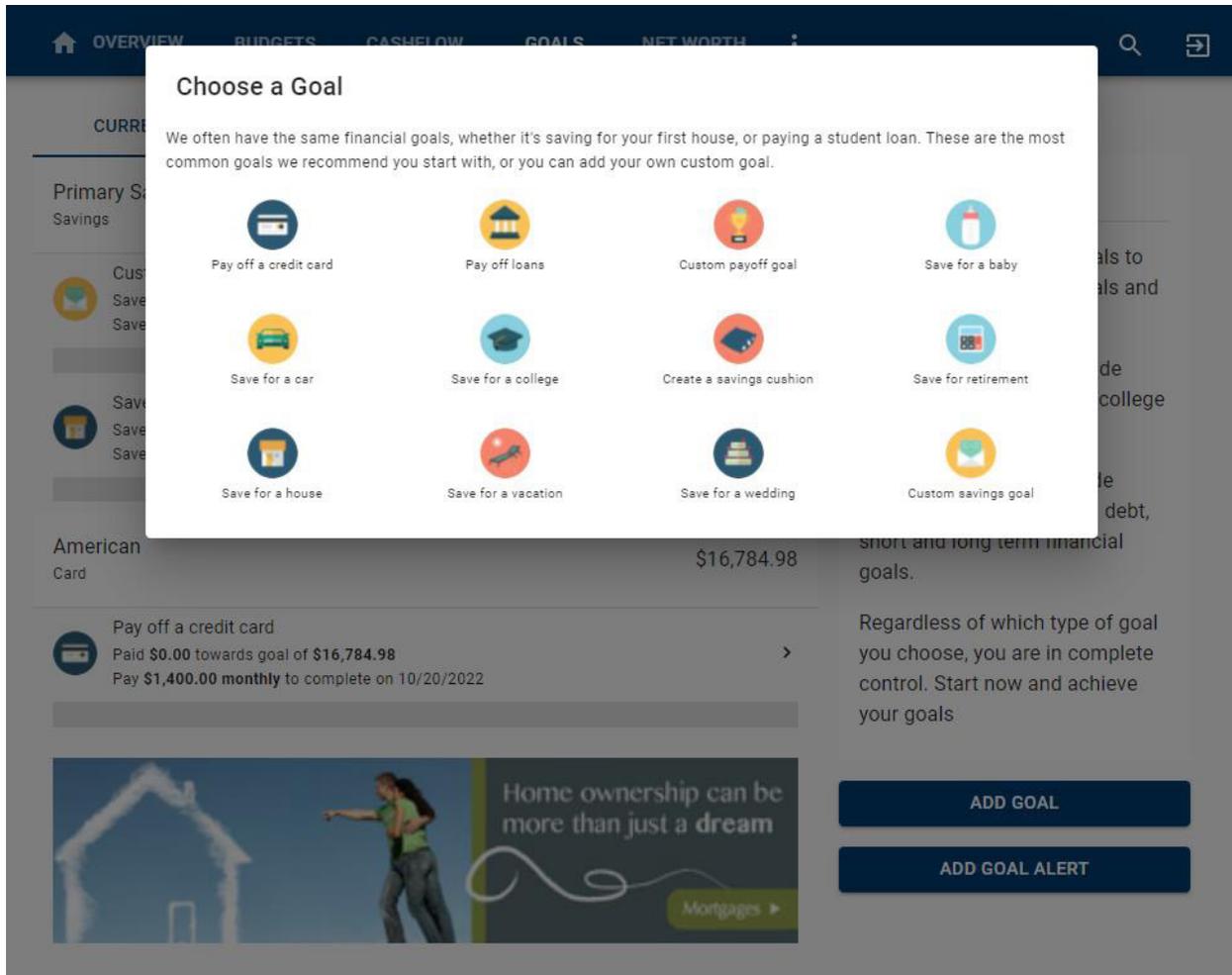
Pay Off Goals could include paying off your credit card debt, short and long term financial goals.

Regardless of which type of goal you choose, you are in complete control. Start now and achieve your goals

ADD GOAL **ADD GOAL ALERT**

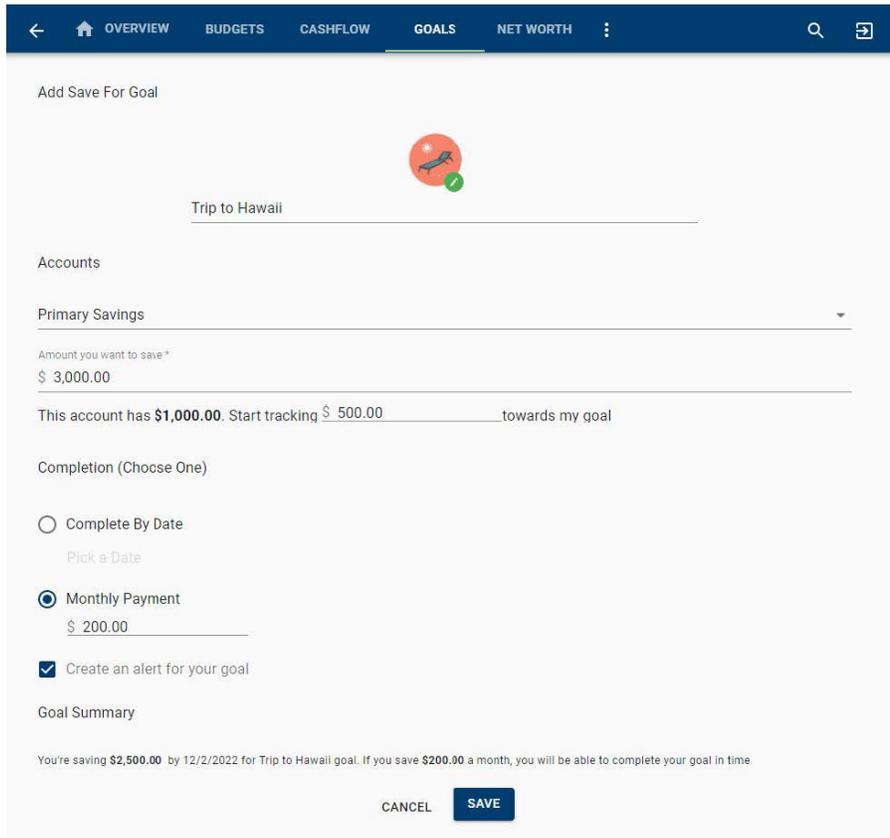
The More You Know: The Goals tab also allows you to view and modify existing Goals. You can rename, increase/decrease goal amounts, and even modify the accounts to track by clicking on the appropriate one.

Step 3: Choose one of our suggested goal-types or select the *Custom Savings Goal* to create one of your own.



Step 4: Complete the following fields related to the *Goal* you are establishing. Input the starting balance of an account and how much you would like to use and track towards your goal. If you would like to begin saving for this goal starting at \$0, enter a zero in the dollar amount field. In the example below, the user’s Primary Savings account has a current balance of \$1,000.00. They are choosing to apply \$500.00 of that \$1,000.00 to their *Trip to Hawaii*.

Step 5: Select *Save*.



← **OVERVIEW** BUDGETS CASHFLOW **GOALS** NET WORTH ⋮ 🔍 📄

Add Save For Goal


Trip to Hawaii

Accounts

Primary Savings ▾

Amount you want to save *
\$ 3,000.00

This account has **\$1,000.00**. Start tracking \$ 500.00 towards my goal

Completion (Choose One)

Complete By Date
Pick a Date

Monthly Payment
\$ 200.00

Create an alert for your goal

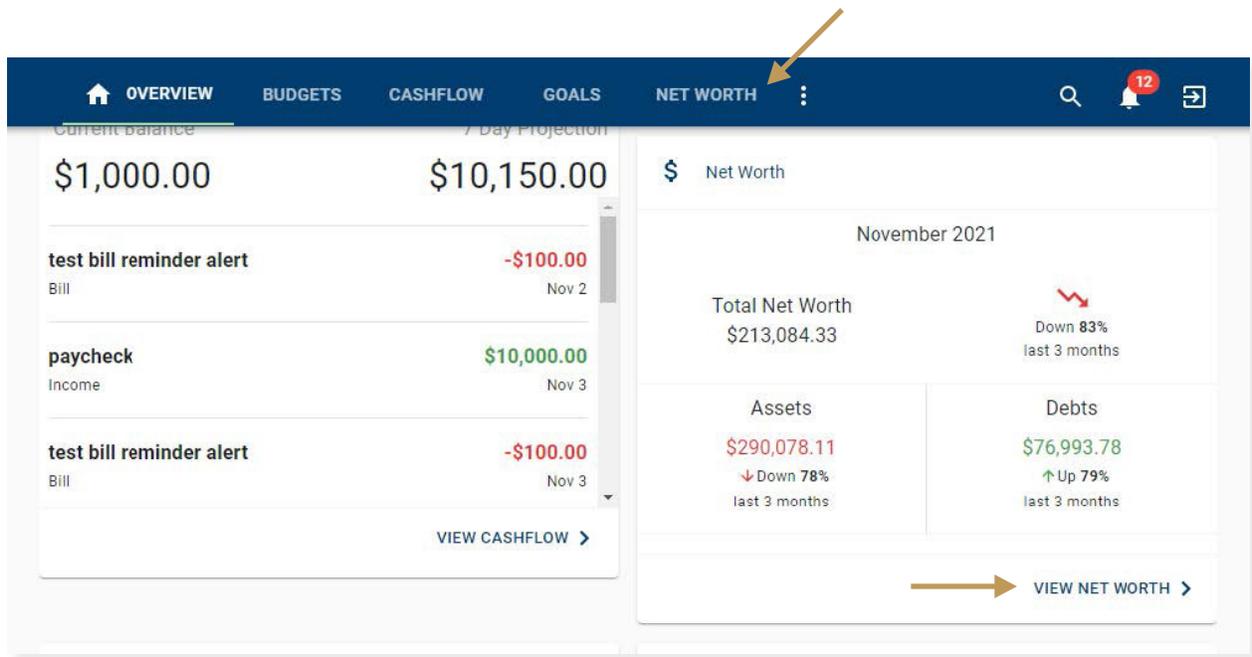
Goal Summary

You're saving **\$2,500.00** by 12/2/2022 for Trip to Hawaii goal. If you save **\$200.00** a month, you will be able to complete your goal in time

CANCEL **SAVE**

How to Add External Accounts, Assets or Liabilities to Net Worth

Step 1: Navigate to PFM and select the *View Net Worth* button on your dashboard, or choose the Net Worth tab in the toolbar.

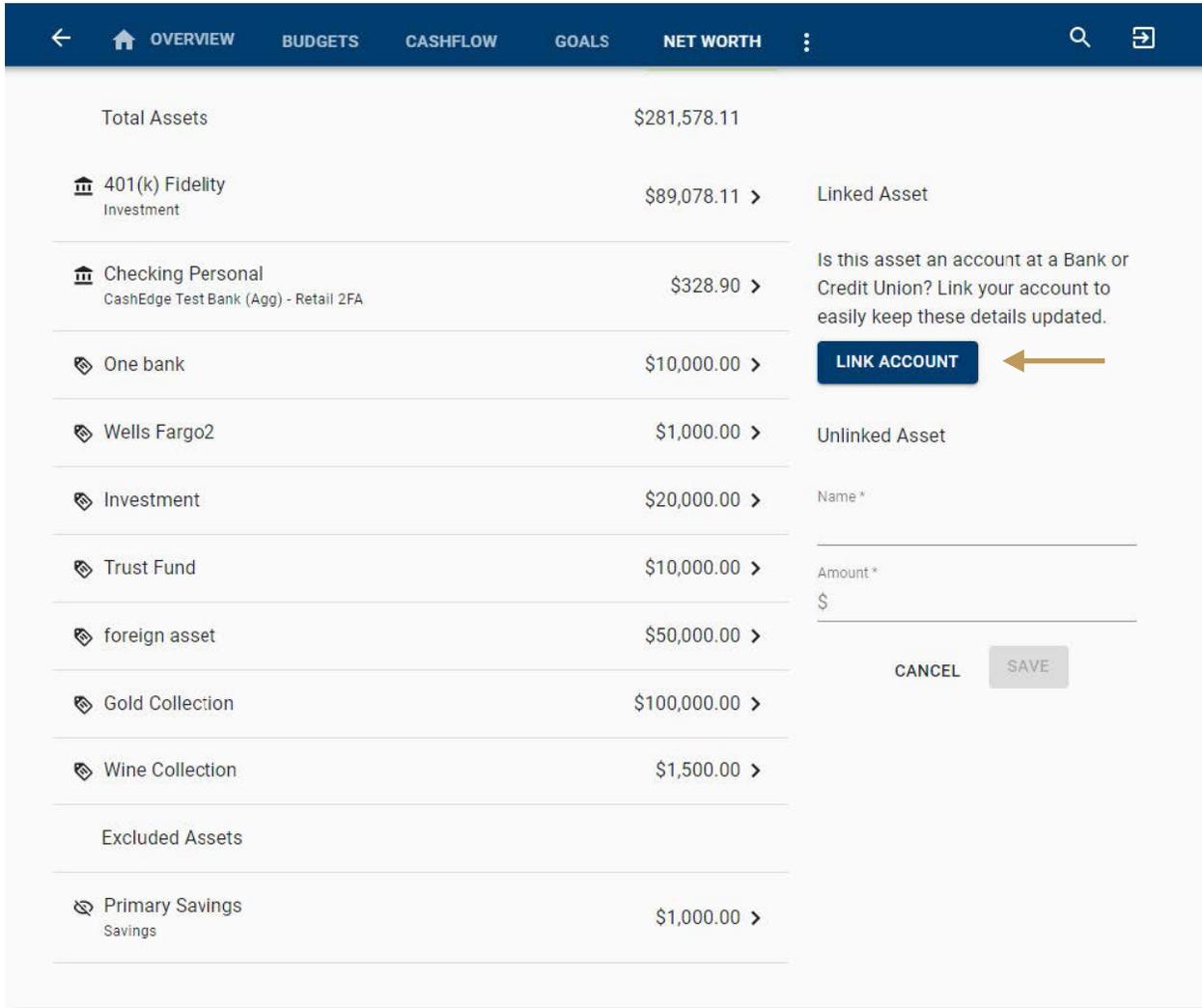


Step 2: Select *Add Asset* or *Add Liability*.



The More You Know: The Net Worth tab allows you to track investments, wealth, and debt all in one place; while having access to monthly, quarterly, and annual trends.

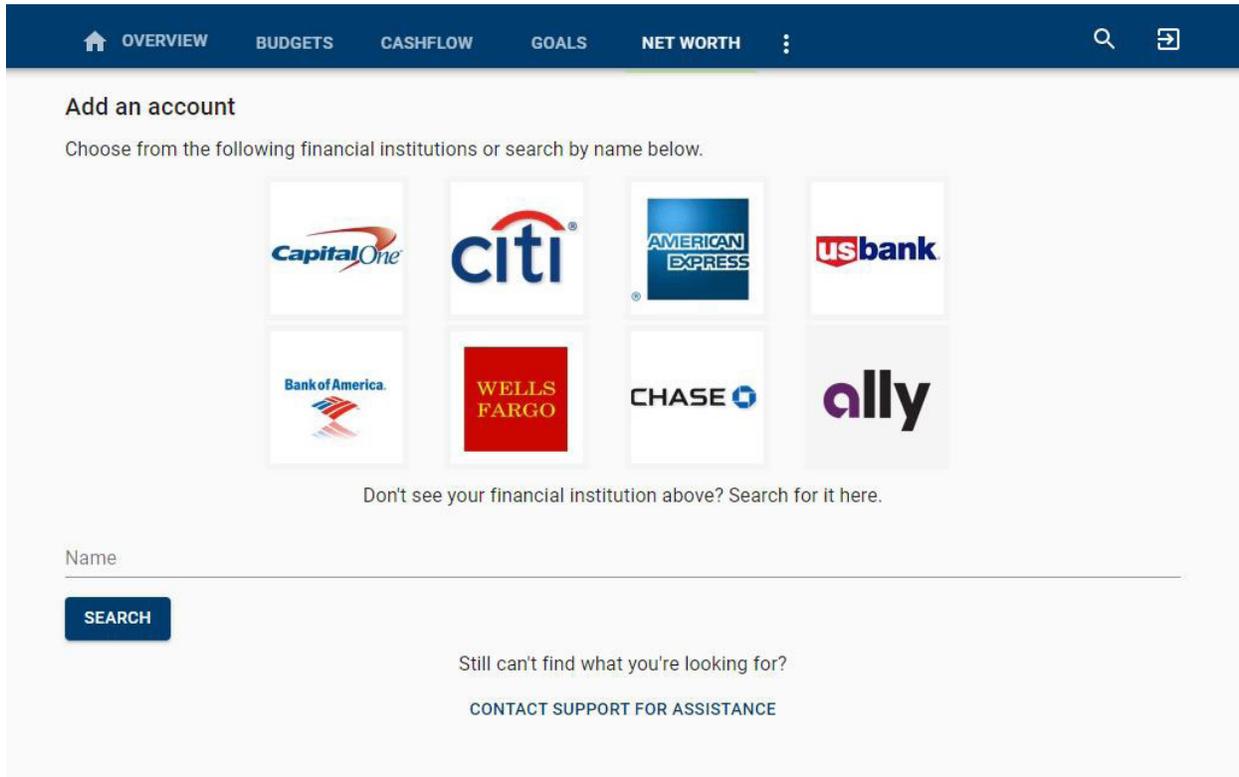
Step 3: Use the *Link Account* button to link an account held at an external financial institution.



The screenshot shows the 'NET WORTH' section of the Keystone Bank app. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area displays a list of assets with their values and a 'LINK ACCOUNT' button for the 'One bank' asset. A yellow arrow points to the 'LINK ACCOUNT' button. Below the list, there is a form for linking an account, including fields for 'Name *', 'Amount *', and a '\$' symbol, along with 'CANCEL' and 'SAVE' buttons.

Asset Name	Value	Status
Total Assets	\$281,578.11	
401(k) Fidelity Investment	\$89,078.11	Linked Asset
Checking Personal CashEdge Test Bank (Agg) - Retail 2FA	\$328.90	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.
One bank	\$10,000.00	LINK ACCOUNT ←
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Name *
Trust Fund	\$10,000.00	Amount *
foreign asset	\$50,000.00	\$
Gold Collection	\$100,000.00	
Wine Collection	\$1,500.00	
Excluded Assets		
Primary Savings Savings	\$1,000.00	

Step 4: Select or search for the financial institution your external asset or liability is held at.



OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH

Add an account

Choose from the following financial institutions or search by name below.

Capital One Citi AMERICAN EXPRESS usbank

Bank of America WELLS FARGO CHASE ally

Don't see your financial institution above? Search for it here.

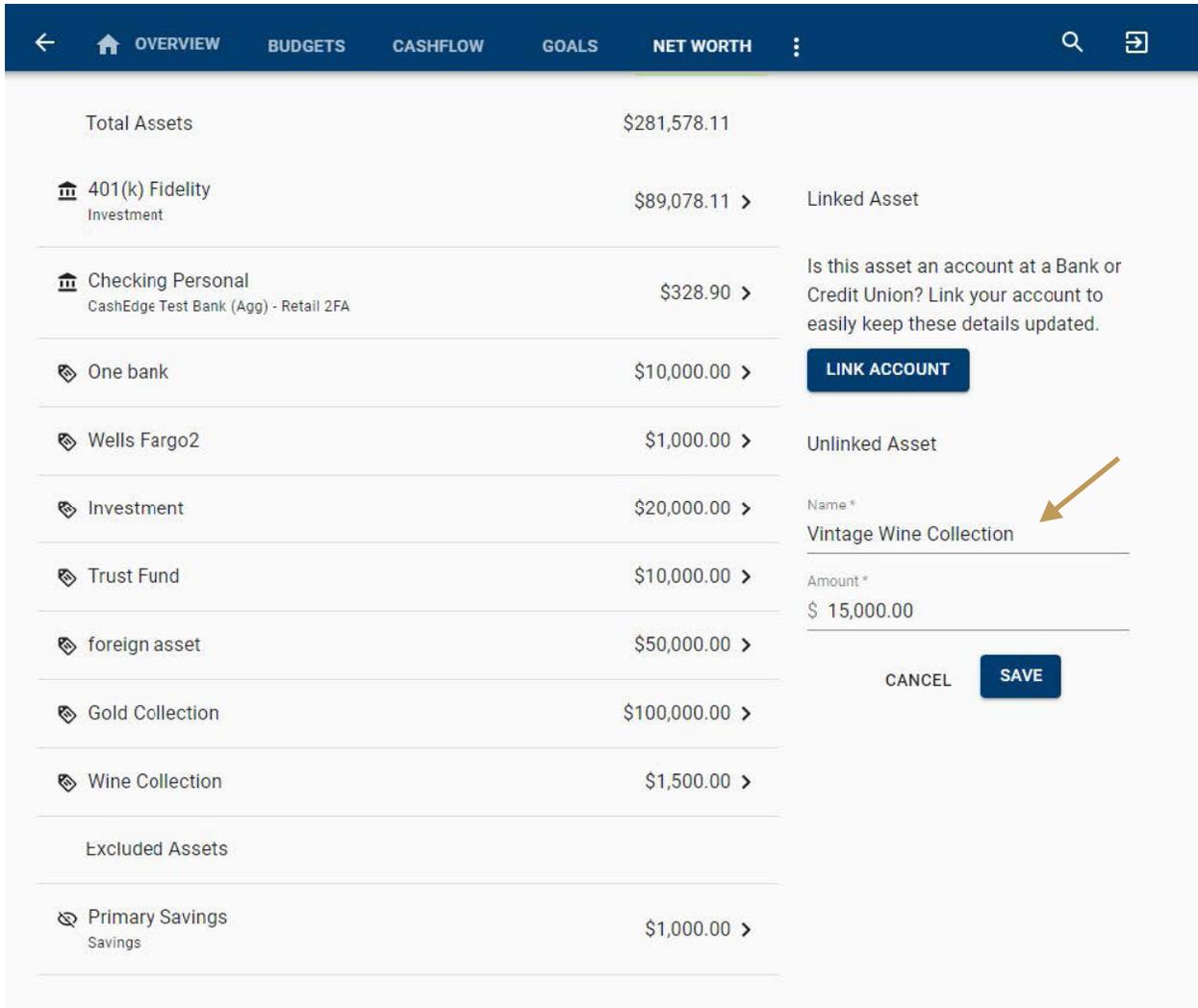
Name

SEARCH

Still can't find what you're looking for?

[CONTACT SUPPORT FOR ASSISTANCE](#)

Step 5: If the asset/liability is not a linkable account, you can add the information manually using the *Name* and *Amount* fields.



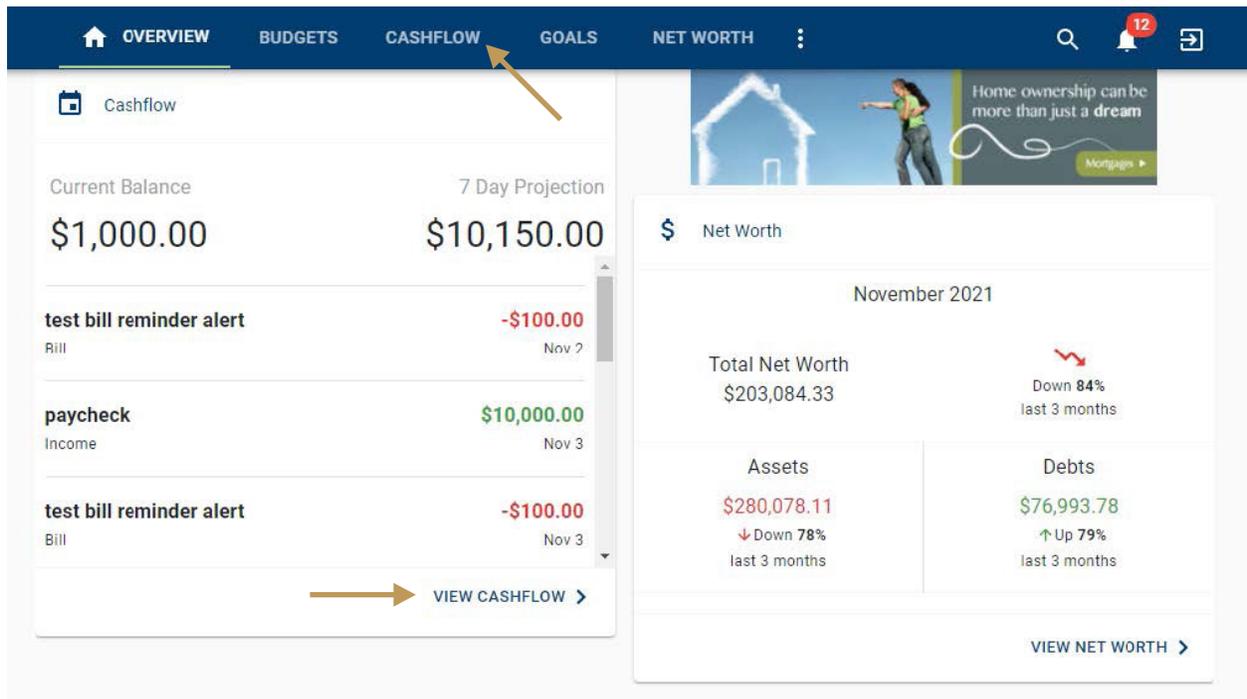
The screenshot shows the 'NET WORTH' section of the app. A list of assets is displayed with their values and categories. A 'LINK ACCOUNT' button is visible next to the 'One bank' asset. Below the list, a manual entry form is shown for an 'Unlinked Asset' named 'Vintage Wine Collection' with an amount of \$15,000.00. A yellow arrow points to the 'Name' field.

Asset Name	Value	Category
Total Assets	\$281,578.11	
401(k) Fidelity Investment	\$89,078.11	Linked Asset
Checking Personal (CashEdge Test Bank (Agg) - Retail 2FA)	\$328.90	Is this asset an account at a Bank or Credit Union? Link your account to easily keep these details updated.
One bank	\$10,000.00	LINK ACCOUNT
Wells Fargo2	\$1,000.00	Unlinked Asset
Investment	\$20,000.00	Name * Vintage Wine Collection
Trust Fund	\$10,000.00	Amount * \$ 15,000.00
foreign asset	\$50,000.00	CANCEL SAVE
Gold Collection	\$100,000.00	
Wine Collection	\$1,500.00	
Excluded Assets		
Primary Savings (Savings)	\$1,000.00	

Step 6: Select Save.

How to Add Income and Bills to the Cashflow Calendar

Step 1: Navigate to PFM and select the *View Cashflow* button on your dashboard, or choose the *Cashflow* tab on the toolbar.



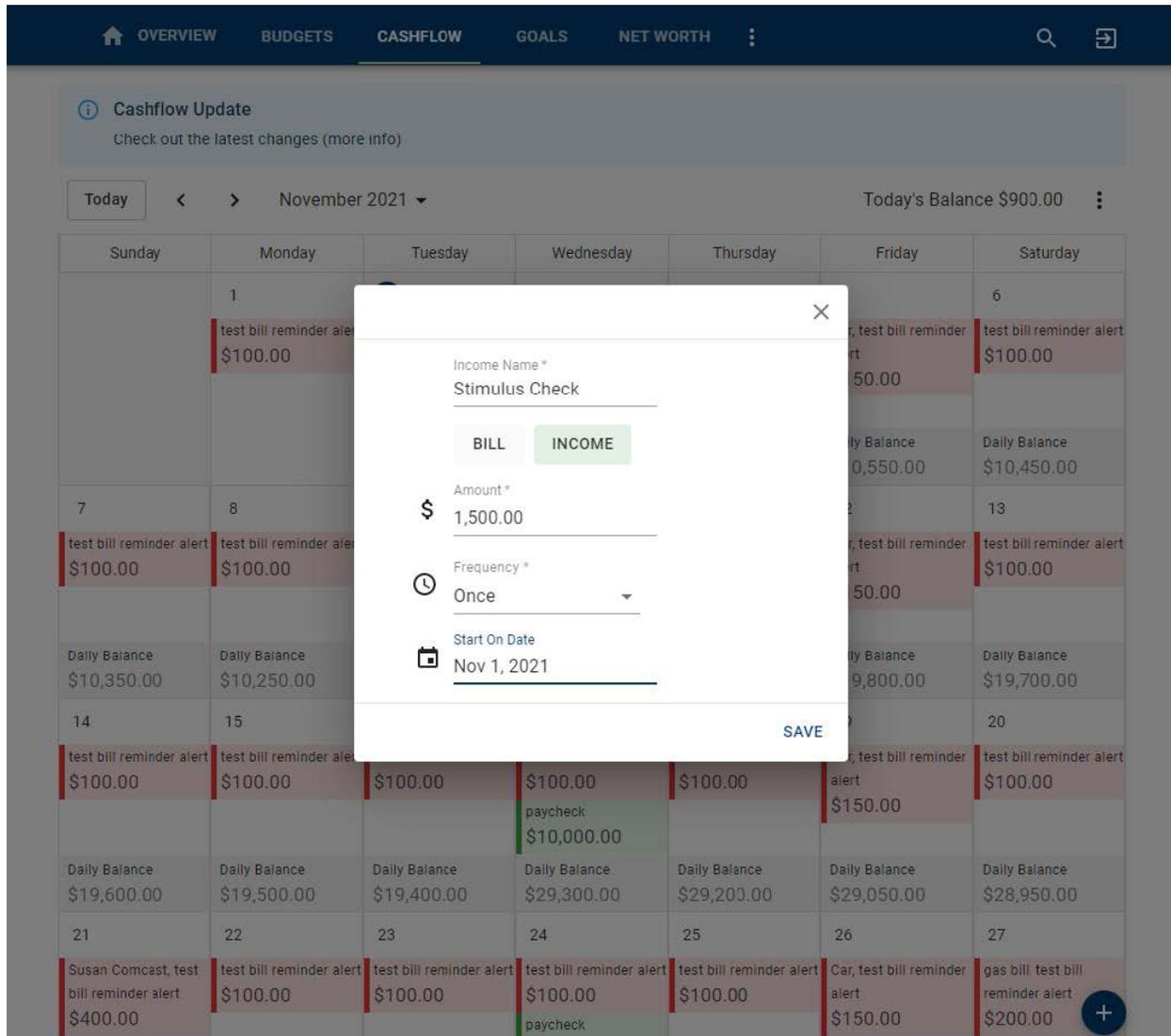
The screenshot shows the Keystone Bank Personal Financial Management (PFM) dashboard. The navigation bar at the top includes tabs for OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. The CASHFLOW tab is selected and highlighted with a blue arrow. Below the navigation bar, the Cashflow section displays a calendar view for November 2021. It shows a current balance of \$1,000.00 and a 7-day projection of \$10,150.00. The calendar lists transactions: a bill reminder for -\$100.00 on Nov 2, a paycheck for \$10,000.00 on Nov 3, and another bill reminder for -\$100.00 on Nov 3. A blue arrow points to the 'VIEW CASHFLOW' button at the bottom of the calendar. To the right, the Net Worth section shows a total net worth of \$203,084.33 for November 2021, with a red arrow indicating a 84% decrease over the last 3 months. It also shows assets of \$280,078.11 (down 78% last 3 months) and debts of \$76,993.78 (up 79% last 3 months). A blue arrow points to the 'VIEW NET WORTH' button at the bottom of the Net Worth section.

Step 2: Select the  icon in the bottom right-hand corner of the screen.

🏠 OVERVIEW BUDGETS CASHFLOW GOALS NET WORTH ⋮ 🔍 📄						
📌 Cashflow Update Check out the latest changes (more info)						
Today		November 2021			Today's Balance \$900.00	
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	1	2	3	4	5	6
	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	test bill reminder alert \$100.00			
		paycheck \$10,000.00				
		Daily Balance \$900.00	Daily Balance \$10,800.00	Daily Balance \$10,700.00	Daily Balance \$10,550.00	Daily Balance \$10,450.00
7	8	9	10	11	12	13
test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	test bill reminder alert \$100.00
			paycheck \$10,000.00			
Daily Balance \$10,350.00	Daily Balance \$10,250.00	Daily Balance \$10,150.00	Daily Balance \$20,050.00	Daily Balance \$19,950.00	Daily Balance \$19,800.00	Daily Balance \$19,700.00
14	15	16	17	18	19	20
test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	test bill reminder alert \$100.00
			paycheck \$10,000.00			
Daily Balance \$19,600.00	Daily Balance \$19,500.00	Daily Balance \$19,400.00	Daily Balance \$29,300.00	Daily Balance \$29,200.00	Daily Balance \$29,050.00	Daily Balance \$28,950.00
21	22	23	24	25	26	27
Susan Comcast, test bill reminder alert \$400.00	test bill reminder alert \$100.00	Car, test bill reminder alert \$150.00	gas bill, test bill reminder alert \$200.00			
			paycheck			

The More You Know: You can manage the accounts shown on your cashflow calendar by selecting the ellipsis button in the upper-right hand corner of the screen and choosing *Configure Accounts*.

Step 3: Select the *Bill* or *Income* tab and complete the following fields.



The screenshot shows the 'Cashflow Update' screen in the Keystone Bank app. A modal form is open for adding a new entry. The form fields are as follows:

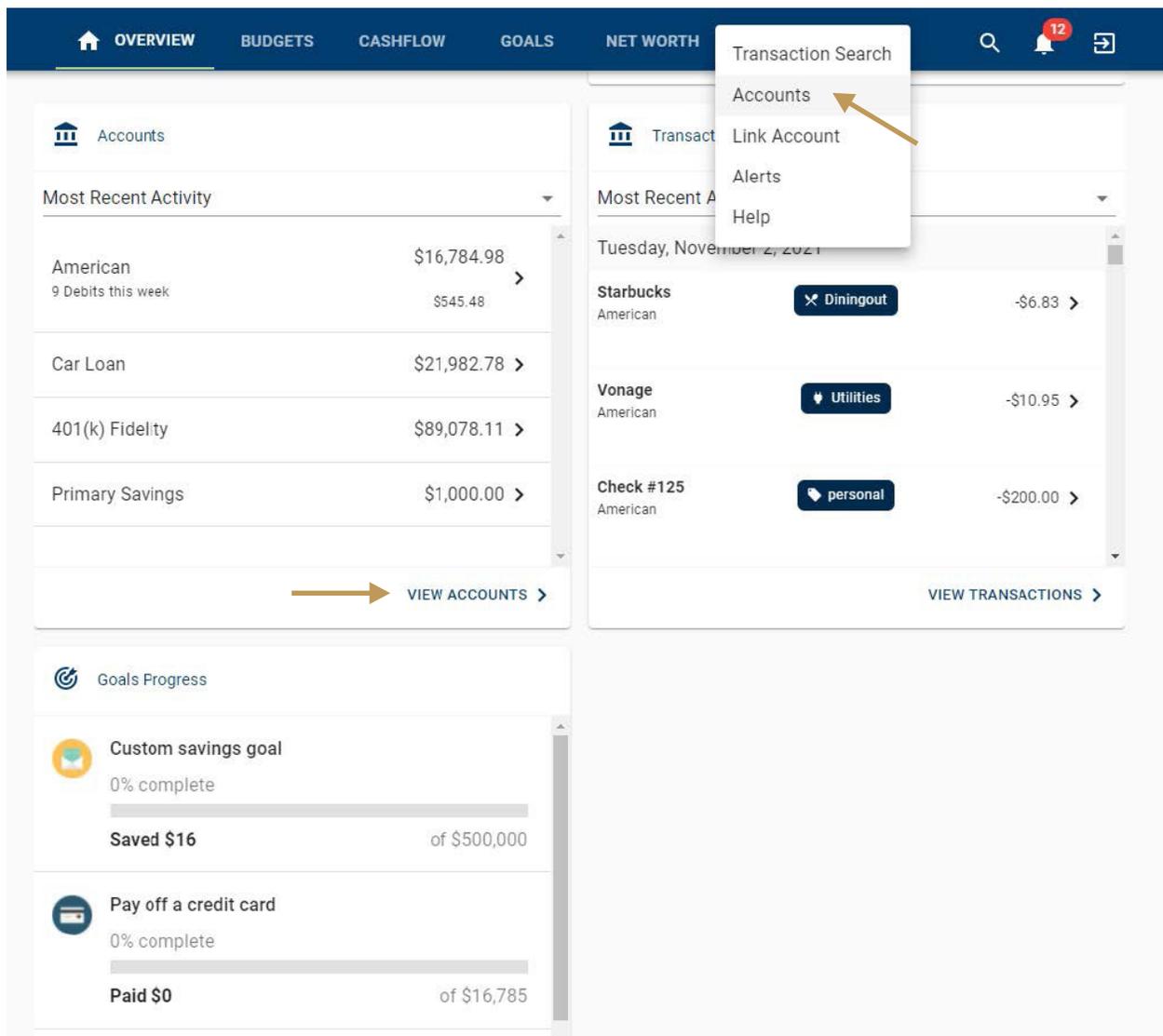
- Income Name*:** Stimulus Check
- Category:** INCOME (selected)
- Amount*:** \$ 1,500.00
- Frequency*:** Once
- Start On Date:** Nov 1, 2021

A 'SAVE' button is located at the bottom right of the modal. The background shows a calendar view for November 2021 with various transactions and daily balances.

Step 4: Select Save.

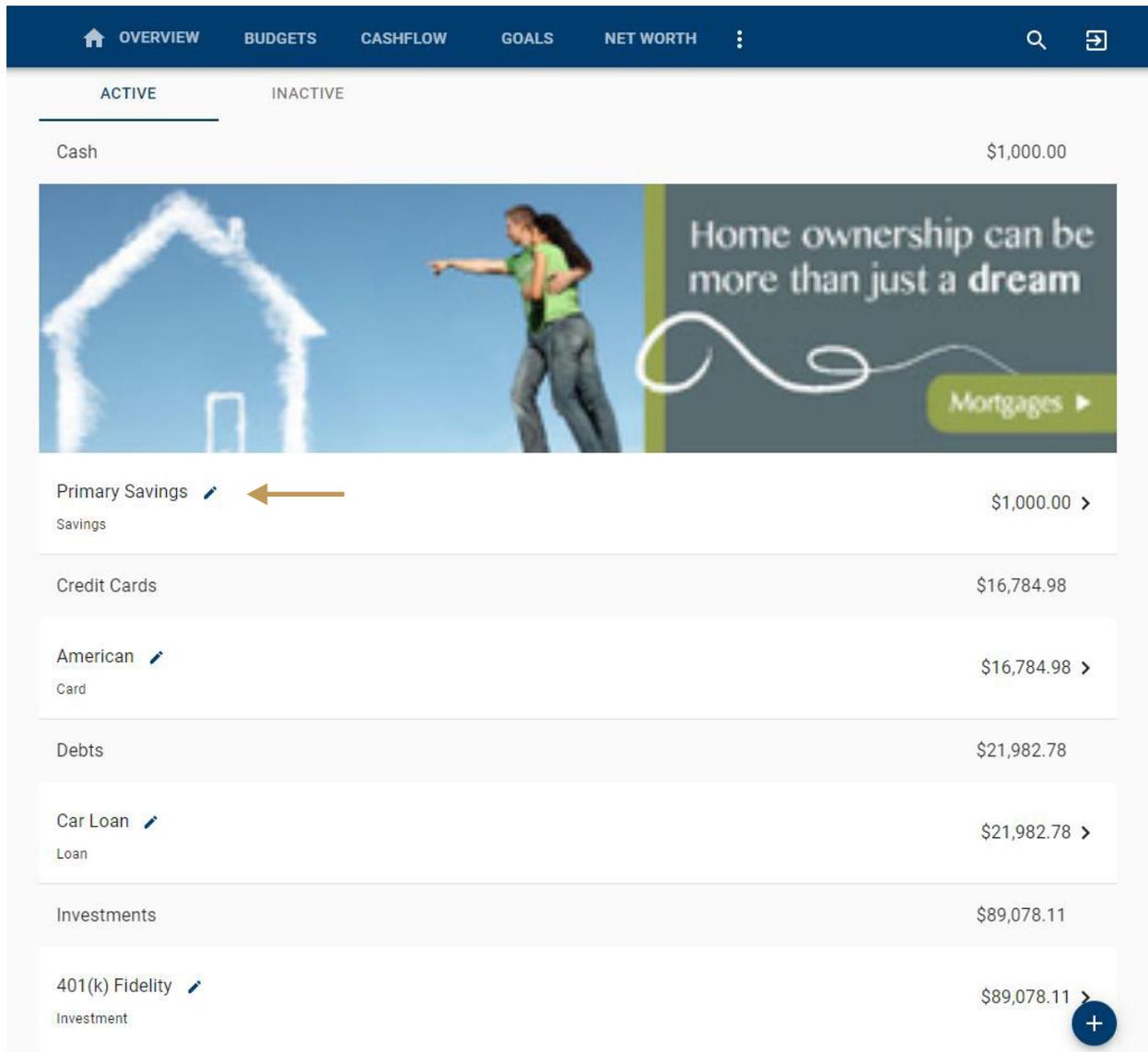
How to Add Accounts to be Viewable in PFM

Step 1: Navigate to PFM and select the *View Accounts* button on your dashboard, or choose the ellipsis on the toolbar to select *Accounts*.



The screenshot displays the Keystone Bank PFM dashboard. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. A search icon, a notification bell with '12', and a share icon are on the right. The main content area is divided into two columns. The left column, titled 'Accounts', shows a list of accounts: American (\$16,784.98), Car Loan (\$21,982.78), 401(k) Fidelity (\$89,078.11), and Primary Savings (\$1,000.00). A 'VIEW ACCOUNTS >' button is at the bottom of this section. The right column, titled 'Transactions', shows a list of transactions: Starbucks American (-\$6.83), Vonage American (-\$10.95), and Check #125 American (-\$200.00). A 'VIEW TRANSACTIONS >' button is at the bottom of this section. A dropdown menu is open over the 'Transactions' section, with 'Accounts' selected and highlighted by an orange arrow. Other options in the menu include 'Transaction Search', 'Link Account', 'Alerts', and 'Help'. Below the 'Accounts' section, there is a 'Goals Progress' section with two goals: 'Custom savings goal' (0% complete, Saved \$16 of \$500,000) and 'Pay off a credit card' (0% complete, Paid \$0 of \$16,785).

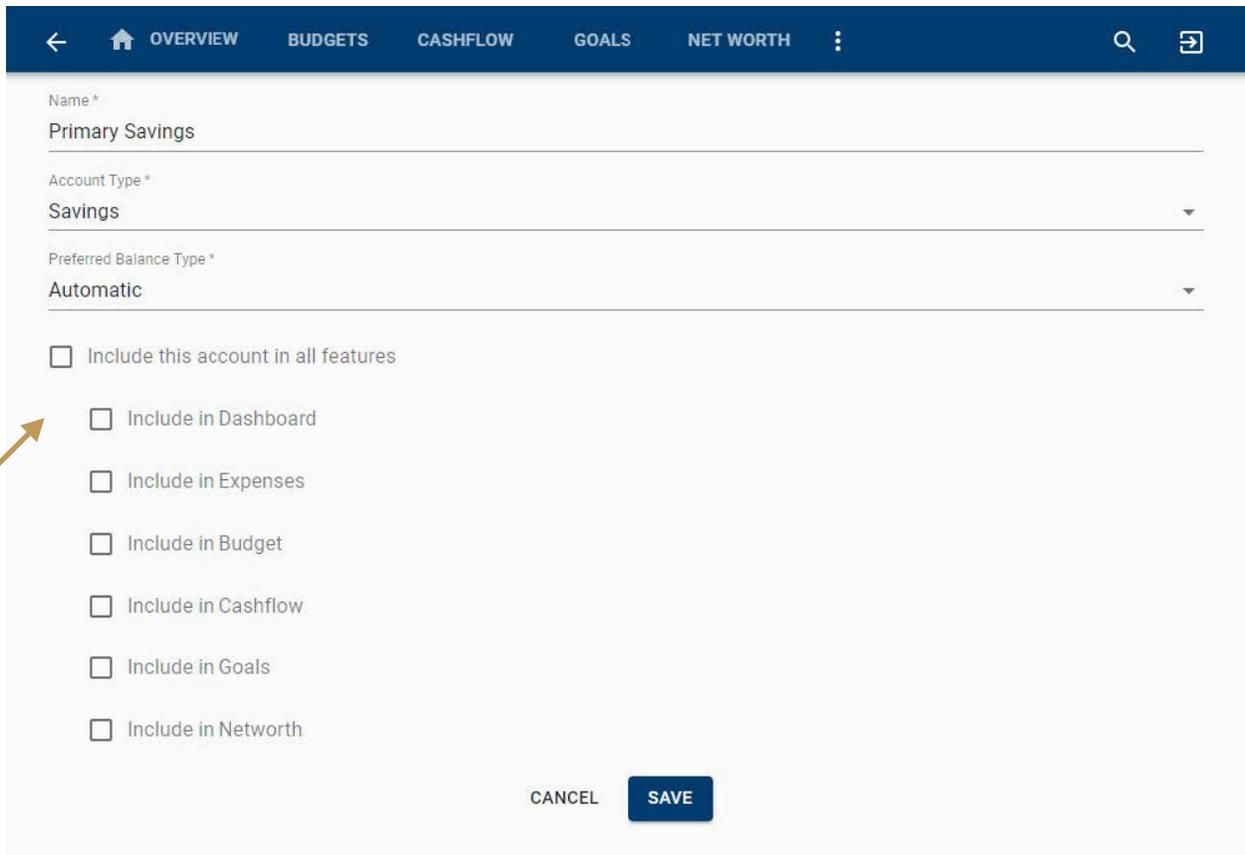
Step 2: Select the *Edit* pen/pencil button next to the account you are wanting to work with.



Account Name	Balance
Cash	\$1,000.00
Primary Savings 	\$1,000.00 >
Credit Cards	\$16,784.98
American  Card	\$16,784.98 >
Debts	\$21,982.78
Car Loan  Loan	\$21,982.78 >
Investments	\$89,078.11
401(k) Fidelity  Investment	\$89,078.11 >

The More You Know: Our PFM feature allows you to aggregate your external accounts from outside of Keystone to provide you with a full financial picture. Navigate to the *External Accounts* tab or choose the *Plus* icon at the bottom right of the above screen to begin linking.

Step 3: Complete the following fields. Use the checkboxes to choose which Insights features to include with this account.



← **OVERVIEW** BUDGETS CASHFLOW GOALS NET WORTH

Name*
Primary Savings

Account Type*
Savings

Preferred Balance Type*
Automatic

Include this account in all features

Include in Dashboard

Include in Expenses

Include in Budget

Include in Cashflow

Include in Goals

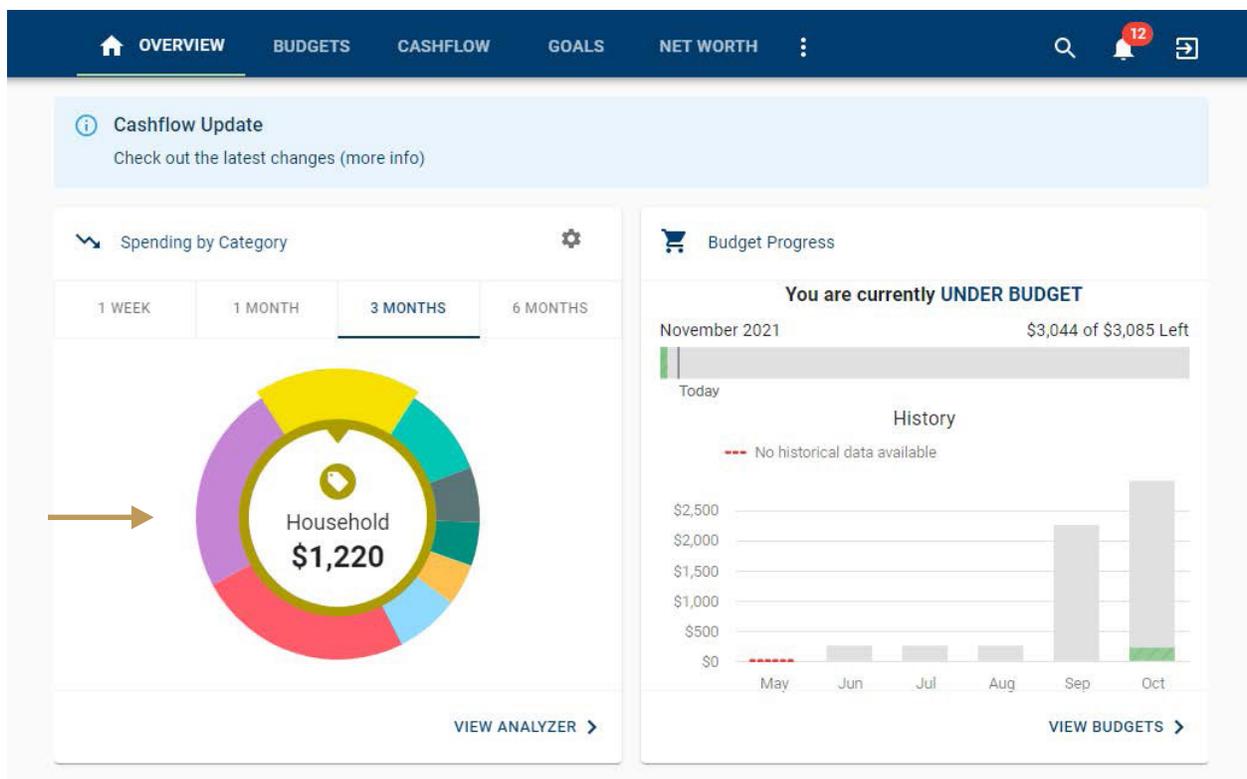
Include in Networth

CANCEL SAVE

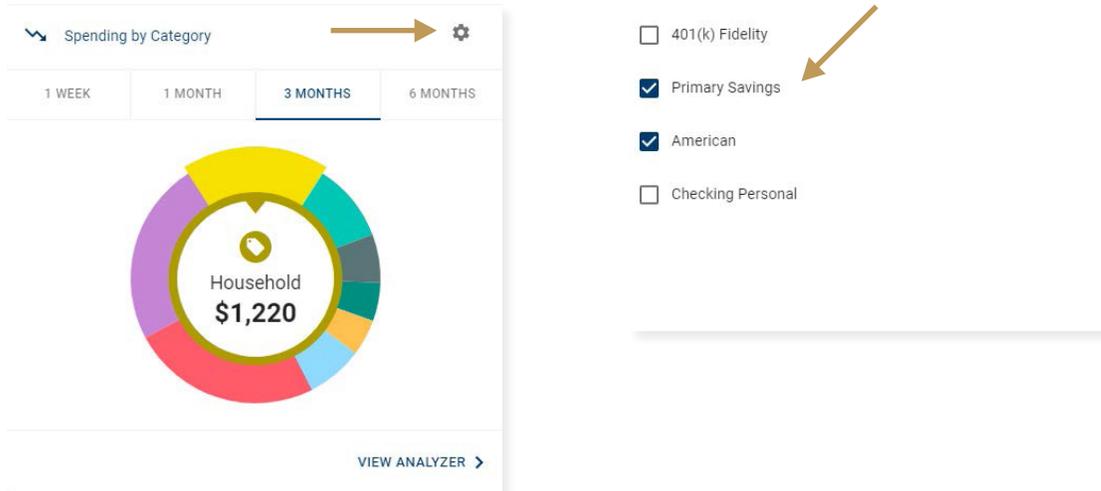
Step 4: Select Save.

Spending by Category

Step 1: Navigate to PFM and locate the *Spending by Category* tile. The Spending Wheel allows you to see which spending category you've spent the most in within a given time frame. You will see 80% of your top spending categories and the remaining 20% are grouped together under the *Other* pie slice. Select the different wheel colors to see how each category compares.

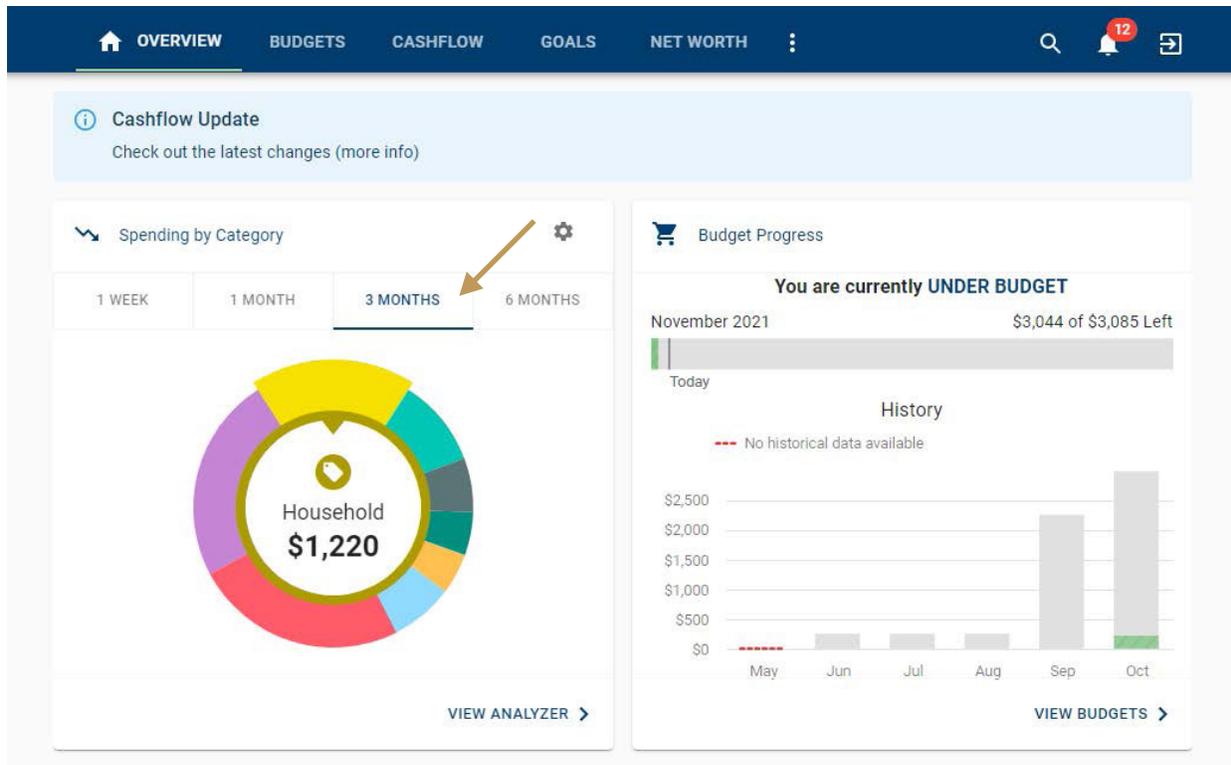


Step 2: Select the  icon in the upper right-hand corner of the *Spending by Category* tile to select the accounts to consider.

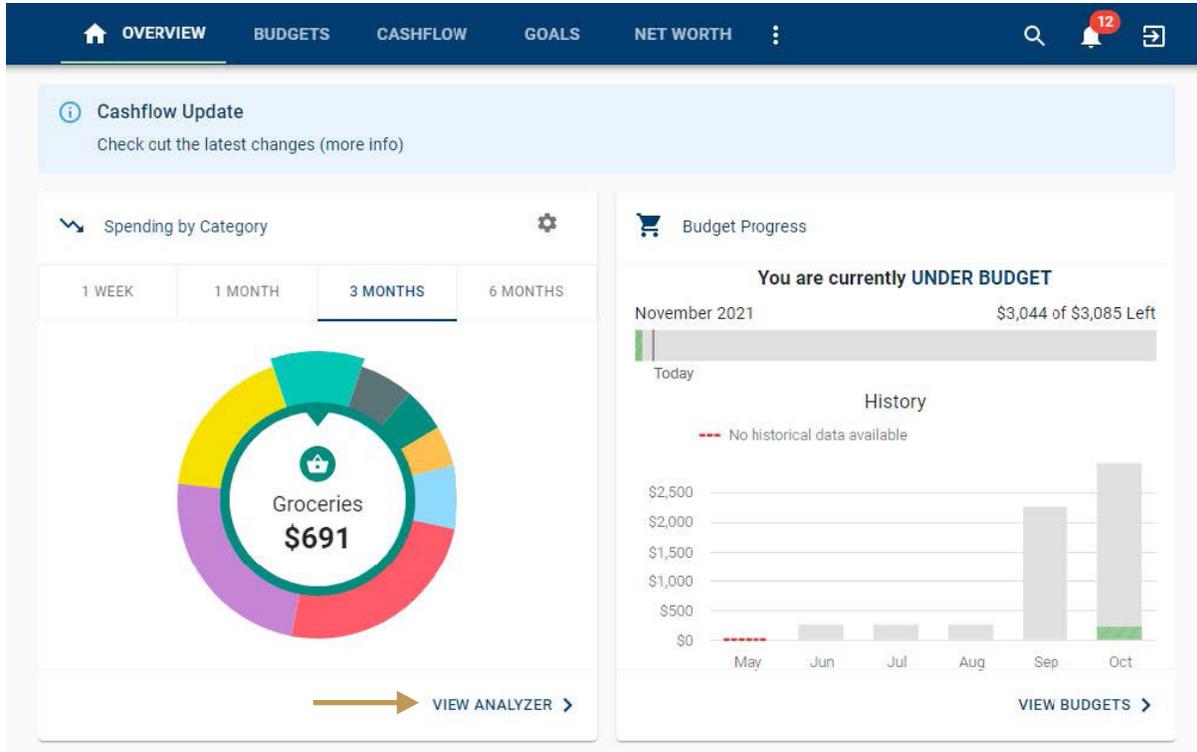


Tag Recap: Transactions will categorize themselves using what we refer to as *Tags* as explained on page 2. Head over to page 2 for a refresher on types of tags and how to personalize your Spending by Category view.

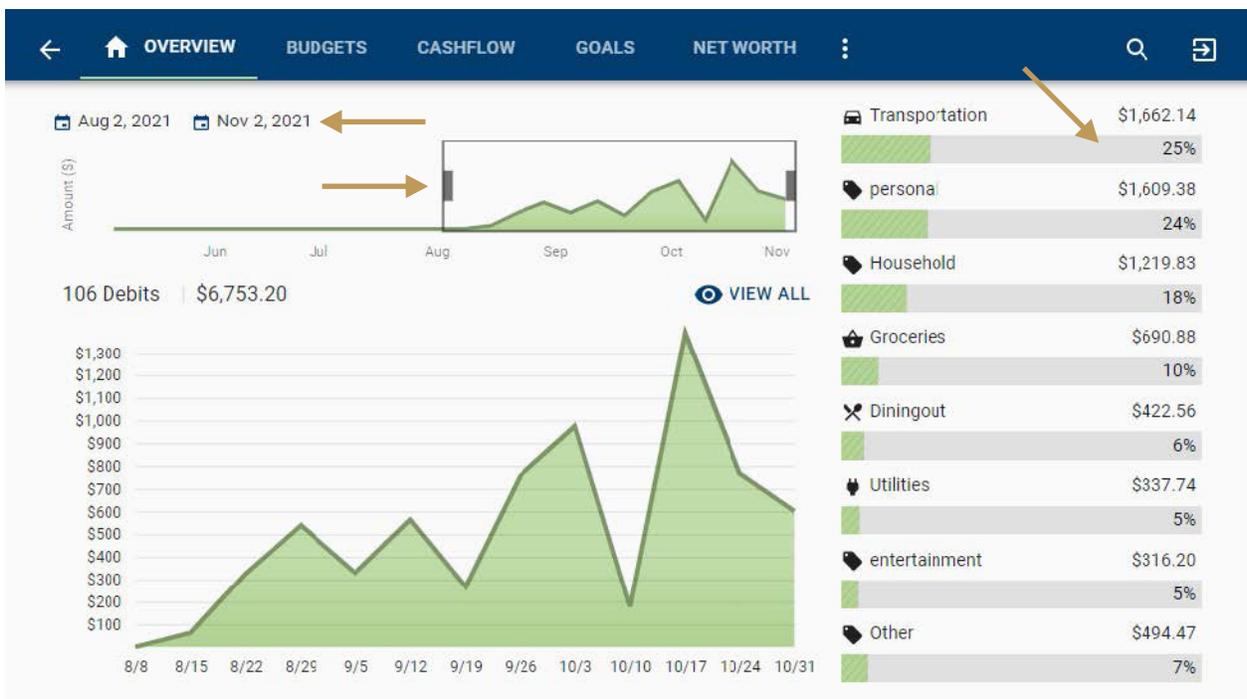
Step 3: Select which period of time you would like to review your budget.



Step 4: Select the *View Analyzer* button to see a breakdown of all expenses within the time frame of your choosing by category.

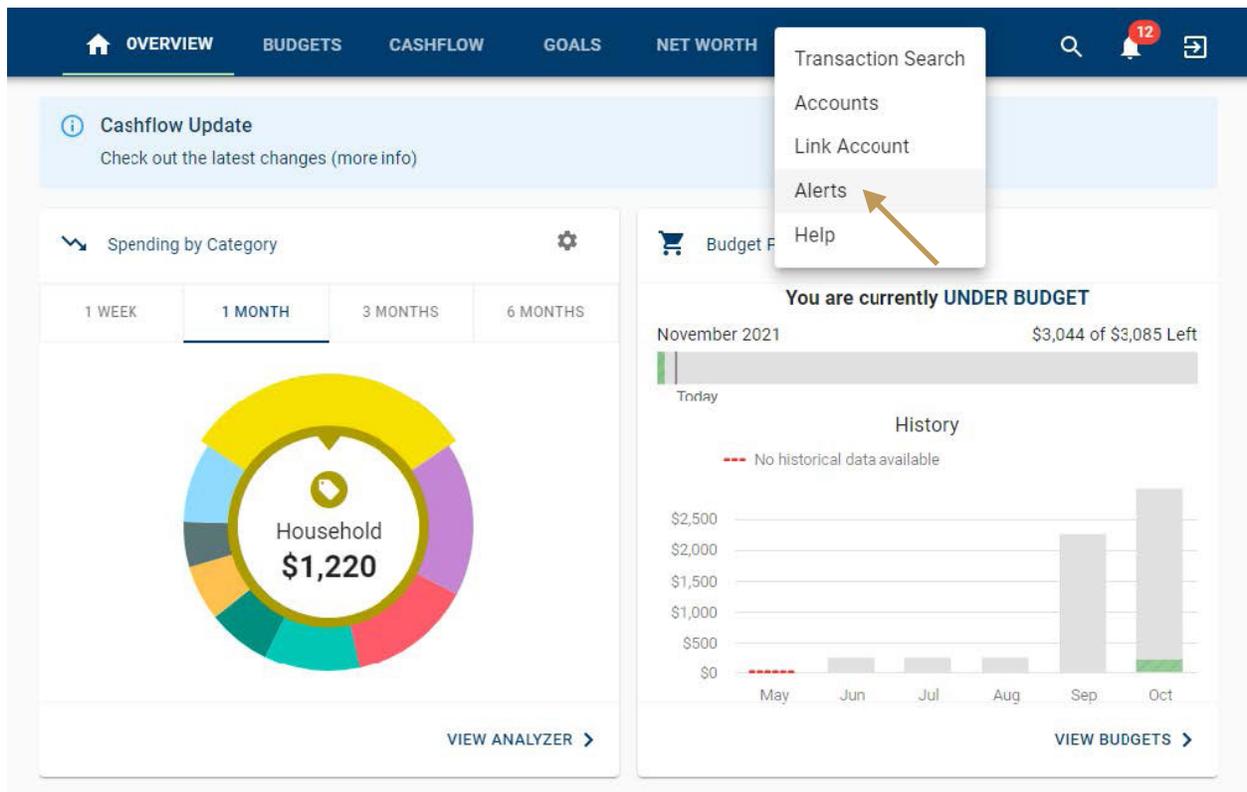


Step 5: Use the calendar dates at the top, or the sliding graph to adjust the time frame you're searching for. On this screen, you will find the total expenses by category in addition to the percentage spent for each category for the given time frame selected. This is beneficial to assist you in identifying any opportunities to improve spending habits. Select a category to view transaction details and customize tags.

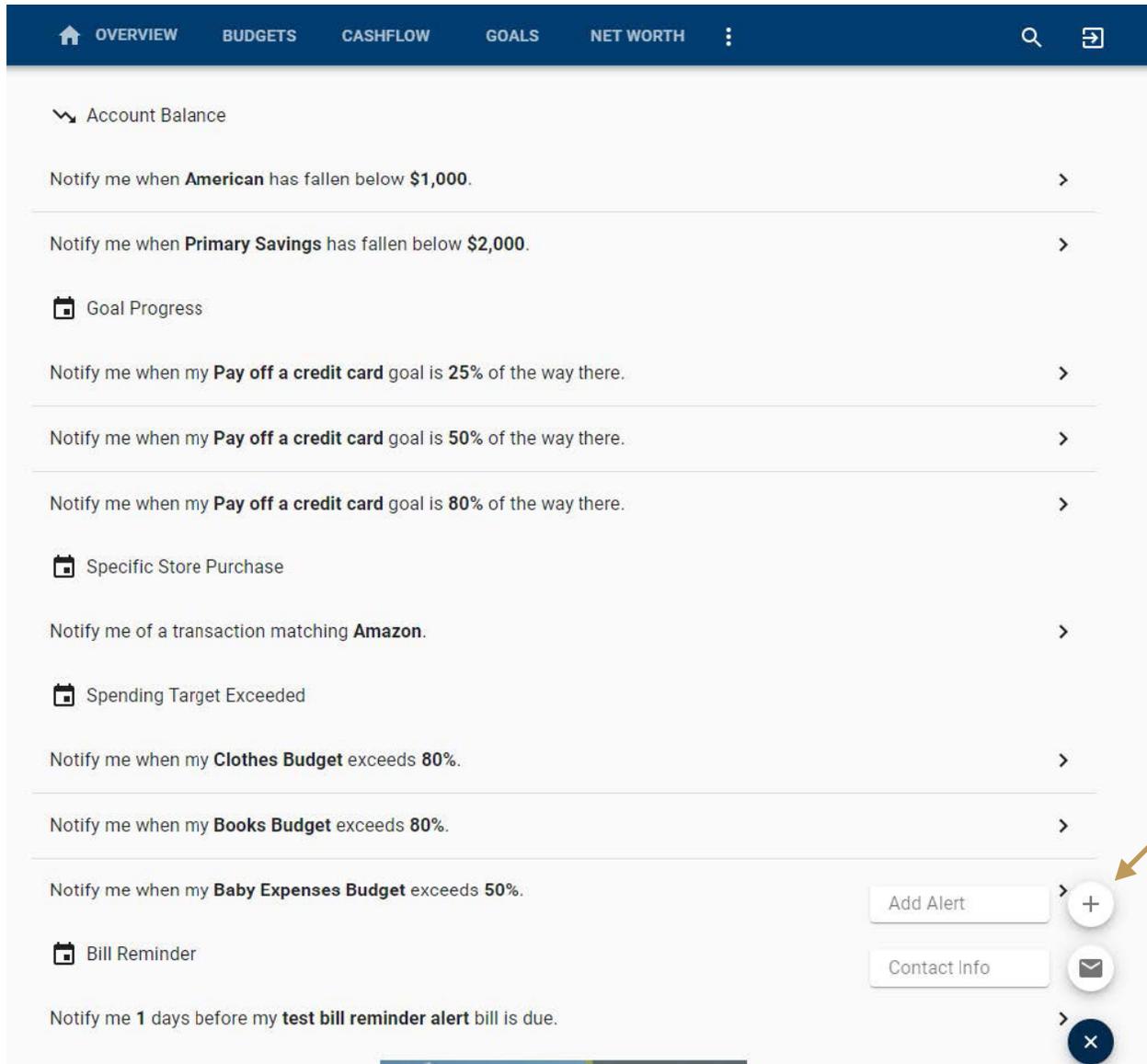


How to Add an Alert

Step 1: Navigate to PFM and choose the ellipsis (three dots) on the toolbar to select Alerts.



Step 2: Select the  at the bottom right-hand corner of the screen. Choose *Add Alert*.

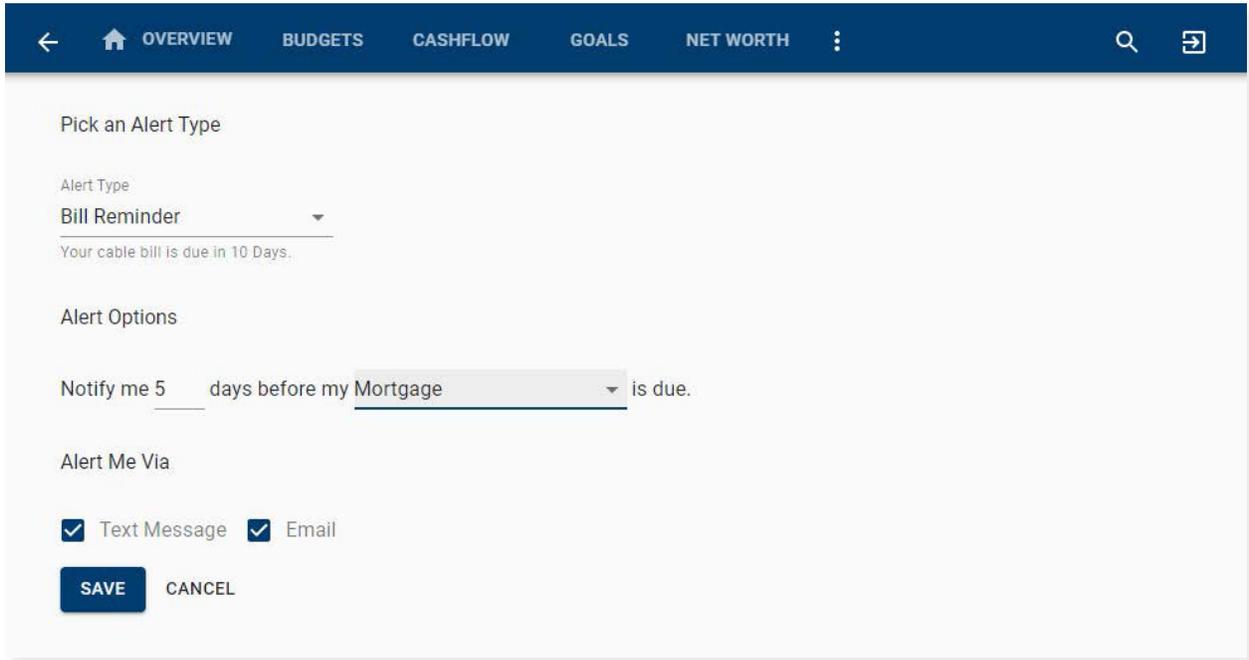


The screenshot shows the 'Alerts' section of the Keystone Bank Insights app. The top navigation bar includes 'OVERVIEW', 'BUDGETS', 'CASHFLOW', 'GOALS', and 'NET WORTH'. The main content area lists several alert categories with their respective settings and a right-pointing chevron icon. At the bottom right, there are three buttons: 'Add Alert' (with a plus icon), 'Contact Info' (with an envelope icon), and a close button (with an 'x' icon). An orange arrow points to the plus icon on the 'Add Alert' button.

Alert Category	Alert Description	Action
Account Balance	Notify me when American has fallen below \$1,000 .	>
Account Balance	Notify me when Primary Savings has fallen below \$2,000 .	>
Goal Progress	Notify me when my Pay off a credit card goal is 25% of the way there.	>
Goal Progress	Notify me when my Pay off a credit card goal is 50% of the way there.	>
Goal Progress	Notify me when my Pay off a credit card goal is 80% of the way there.	>
Specific Store Purchase	Notify me of a transaction matching Amazon .	>
Spending Target Exceeded	Notify me when my Clothes Budget exceeds 80% .	>
Spending Target Exceeded	Notify me when my Books Budget exceeds 80% .	>
Spending Target Exceeded	Notify me when my Baby Expenses Budget exceeds 50% .	> <input type="button" value="Add Alert"/>
Bill Reminder	Notify me 1 days before my test bill reminder alert bill is due.	> <input type="button" value="Contact Info"/>
		> <input type="button" value="Close"/>

The More You Know: You can edit your *Alert* contact information (email address and phone number) by choosing the Plus icon and then *Contact Info*.

Step 3: Complete the following fields to create your desired alert.



The screenshot shows a mobile application interface for creating an alert. At the top is a dark blue navigation bar with a back arrow, a home icon, and menu items: OVERVIEW, BUDGETS, CASHFLOW, GOALS, and NET WORTH. There is also a search icon and a share icon on the right. Below the navigation bar, the main content area is white. It starts with the heading "Pick an Alert Type". Underneath is a section labeled "Alert Type" with a dropdown menu currently set to "Bill Reminder". Below the dropdown, a preview text reads "Your cable bill is due in 10 Days.". The next section is "Alert Options", which includes a field "Notify me 5 days before my Mortgage is due." where "5" is in a text input field and "Mortgage" is in a dropdown menu. Below this is the "Alert Me Via" section, which has two checked checkboxes: "Text Message" and "Email". At the bottom of the form are two buttons: "SAVE" (in a dark blue box) and "CANCEL" (in a light gray box).

Step 4: Select Save.