



Video Transcript: Get Started with Managing Your Finances – My GreenInsights

Note: Upbeat music begins to play.

On screen: Regions Logo appears along with the title, “My GreenInsights: Getting Started.” The green triangle of the Regions logo turns and morphs into a play button icon. A cursor clicks the play button.

[Voice-over] Regions My GreenInsights is money management the way it should be — easy, helpful and secure.

On screen: The desktop screen of Regions Online Banking platform appears. The Insights section of the main navigation is selected and the title of the page is My GreenInsights.

[Voice-over] My GreenInsights provides tools to help you better understand and track your finances.

On screen: A cursor clicks through the menu links at the top of the My GreenInsights section of the website, including Transactions, Spending and Budgets.

[Voice-over] Getting started with My GreenInsights is easy. Log in to Online Banking.

On screen: The log in screen loads for Online Banking. A user enters their password and logs in successfully. The Accounts Overview tab appears.

[Voice-over] Select the Insights tab.

On screen: The cursor selects the Insights tab in the top navigation. The My GreenInsights page opens.

[Voice-over] You will see all of your Regions accounts. We recommend taking four simple steps when you first start using these tools. Step 1: Link all of your accounts so you can see your whole financial picture in one place. Nearly any financial account can be linked. Checking and savings accounts, investments, credit cards, loans and mortgages, and other lines of credit can be added.

On screen: The cursor moves to the All Accounts menu section of the My GreenInsights page and hovers over the user’s Checking, Savings, Investment and Credit Card accounts.

[Voice-over] To add an account, select “Add an Account” on the upper right to open the “Add Accounts” window.

On screen: The cursor moves to the upper right side of the screen and selects the “+ Add an Account” button. The Add Accounts window opens with a search bar that reads “Select your institution.”

[Voice-over] Here you will see a list of popular financial institutions.

On screen: The cursor scrolls down the screen revealing financial institutions the user can add, such as Wells Fargo, Citibank, American Express Credit Card, US Bank, Fidelity Investments and more.

[Voice-over] If you see your institution, select it to continue. If not, select the search bar and enter the name of the institution you're looking for.

On screen: The cursor scrolls back up and types "amazon" into the search bar. Two search results appear for "amazon" and the cursor selects "Amazon Credit Card by Synchrony."

[Voice-over] Once you find your institution, select it from the list and enter the requested login credentials.

On screen: A new screen slides in with a prompt to "Enter your credentials" for Amazon Credit Card by Synchrony along with username and password fields. The cursor clicks away from the screen to return back to the My GreenInsights page.

[Voice-over] Step 2: Review your transaction history. Transactions will be automatically cleansed, so they are easy to read and categorized to make it clear where your money is going.

On screen: The cursor selects the Transactions tab from the top menu bar and scrolls through recent transactions on the screen with columns for Date, Payee, Category, Account and Amount.

[Voice-over] Step 3: Set up a budget. A budget makes it easy to visualize how much you've spent and how much money you have left for the month.

On screen: The cursor moves to the top menu bar and selects the Budgets tab. Red, green and yellow circles of various sizes appear on the screen. Inside the circles contain icons and text representing Home, Travel, Shopping, Gifts, Pets, and more. Some budget circles also have the amount in dollars that the user has spent and budgeted. For example, the Food & Dining budget circle is red and the user has spent \$412 / \$403.

[Voice-over] My GreenInsights will do all of the heavy lifting for you. When you select "Auto-generate Budgets," the budgeting tool will calculate your average monthly spending in each category over the last two months. This will give you a realistic starting point for your budget.

On screen: Text appears on the screen that says, "Take control of your money: Connect all your accounts to create monthly budgets" with options to click one of two buttons: "Start From Scratch" or "Auto-generate Budgets." The cursor hovers over "Auto-generate Budgets."



[Voice-over] And finally, the last step is to set up notifications. Notifications can let you know when you've exceeded your budget or when you're close to exceeding your budget.

On screen: The user returns to the Budgets tab, which shows the red, green and yellow budget circles.

[Voice-over] Select the settings gear on the top right, then select "Notifications" to change notification settings.

On screen: The cursor moves to the top right of the My GreenInsights menu bar and selects the settings gear icon. The Settings screen slides in and the cursor selects Notifications. From that page, the user has the option to verify their email address and opt in to receive email notifications and budgets-specific notifications.

[Voice-over] Select "Edit" to choose how to receive alerts, which accounts will be tracked, and change the amount at which an alert is triggered.

On screen: Under the Budgets heading, this user has opted in to receive notifications for "Exceeded Budget" and "Projected to Exceed Budget." Next to "Exceeded Budget," the cursor selects "Edit." A new screen slides in titled, "Exceeded Budget Details." Under the Delivery Methods heading, the user unchecks "Email" and selects the arrow to return to the previous screen. Next to "Projected to Exceed Budget," the cursor selects "Edit" and confirms their email address is enabled to receive alerts.

[Voice-over] Select the checkbox on the left of an alert to enable or disable the alert.

On screen: Back on the Notifications Settings screen, the cursor disables then enables the "Exceeded Budget" notification checkbox then exits the Settings section.

[Voice-over] When you have a new notification, a red box will appear over the notifications icon in the upper right, indicating the number of unread notifications you have.

On screen: On the My GreenInsights main page, the cursor moves to the top right of the menu bar to the notifications bell icon as a red box appears with the number 1 inside, indicating the user has one new notification.

[Voice-over] Select the notifications icon to view all notifications with the most recent at the top.

On screen: The cursor clicks the notifications icon and the Notifications screen slides in revealing the new notification and date. It reads, "Monday, Nov. 29: You've exceed your Pets budget by \$8.00. \$25.00 / \$17.00." A previous notification is below that which reads, "Saturday, Nov. 27: You've exceeded your Business Services budget by \$2,005.91. \$2,054.91 / \$49.00."

[Voice-over] When you select a notification, you will be redirected to the relevant tool.

On screen: The cursor selects the most recent notification and the Budgets screen opens with the red, green and yellow budget circles.

[Voice-over] With these four simple steps, My GreenInsights can help you better understand and manage your finances, so you can spend less time worrying about money, and more time enjoying the security and comfort it affords you.

On screen: Screen fades to white with the Regions logo with the following disclosure statements: "While accounts information is available from thousands of online financial institution websites, some financial institution accounts may not be compatible. ©2021 Regions Bank. Equal Housing Lender. Member FDIC. Enrollment in Online Banking and eligible Regions accounts required for My GreenInsights. Regions and the Regions logo are registered trademarks of Regions Bank. The LifeGreen color is a trademark of Regions Bank."