HUGHES FINANCIAL SERVICES, LLC

HUGHES FINANCIAL SERVICES, LLC

WEDNESDAY LUNCH & LEARN

Value in your Vault

A GUIDE TO YOUR HFS CLIENT PORTAL: PART 2
SPENDING & BUDGETS

HUGHES FINANCIAL SERVICES, LLC

SPEAKER

Berkeley Meredith, CFP®
Financial Advisor

ABOUT HUGHES FINANCIAL SERVICES

RIA

Independent Registered Investment Advisor

Comprehensive financial planning and wealth management

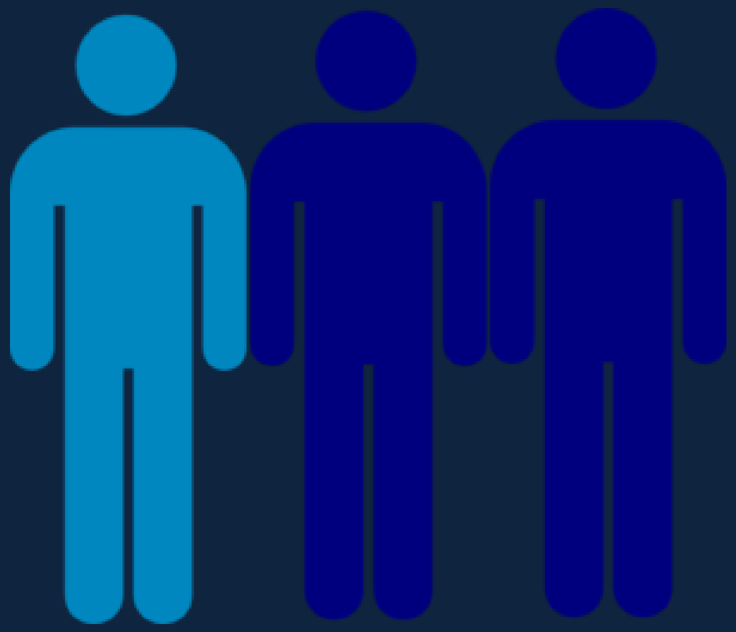
Fiduciary

Professional certifications and continuing education

Over 80 years combined experience

A GUIDE TO YOUR CLIENT PORTAL

Tracking Your Spending



2/3 of Americans DO NOT track their monthly spending

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Benefits of Tracking Your Spending

1. Better insight into spending habits
2. Better relationship with spouse/partner
3. Less impulsive spending
4. More confidence in reaching financial goals
5. Feel less anxious about money

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Spending & Budgets

- Track and categorize spending habits
- Build out monthly spending budgets
- Uses financial data from connected transactional accounts

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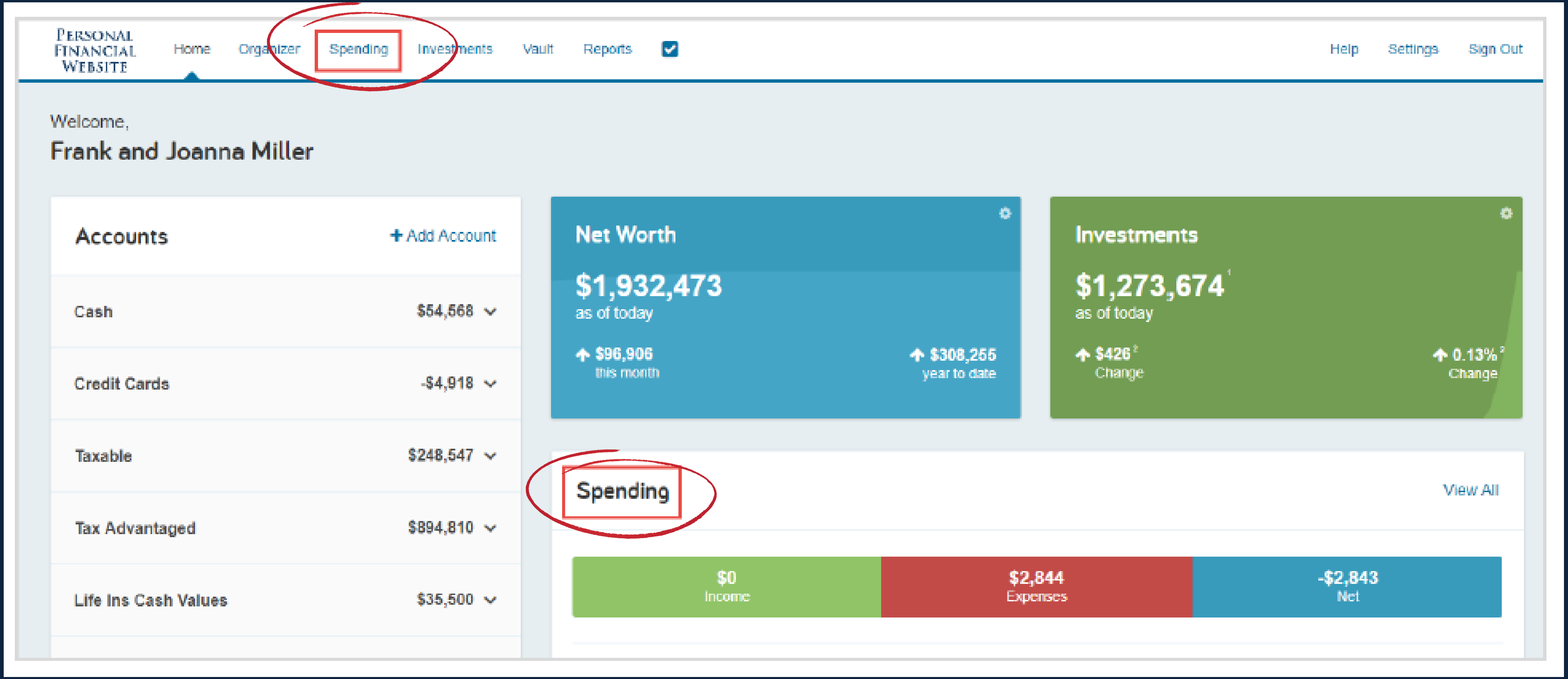
Spending Function



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Privacy Settings

- Under default setting, advisor and other users (i.e., spouse) unable to see spending information

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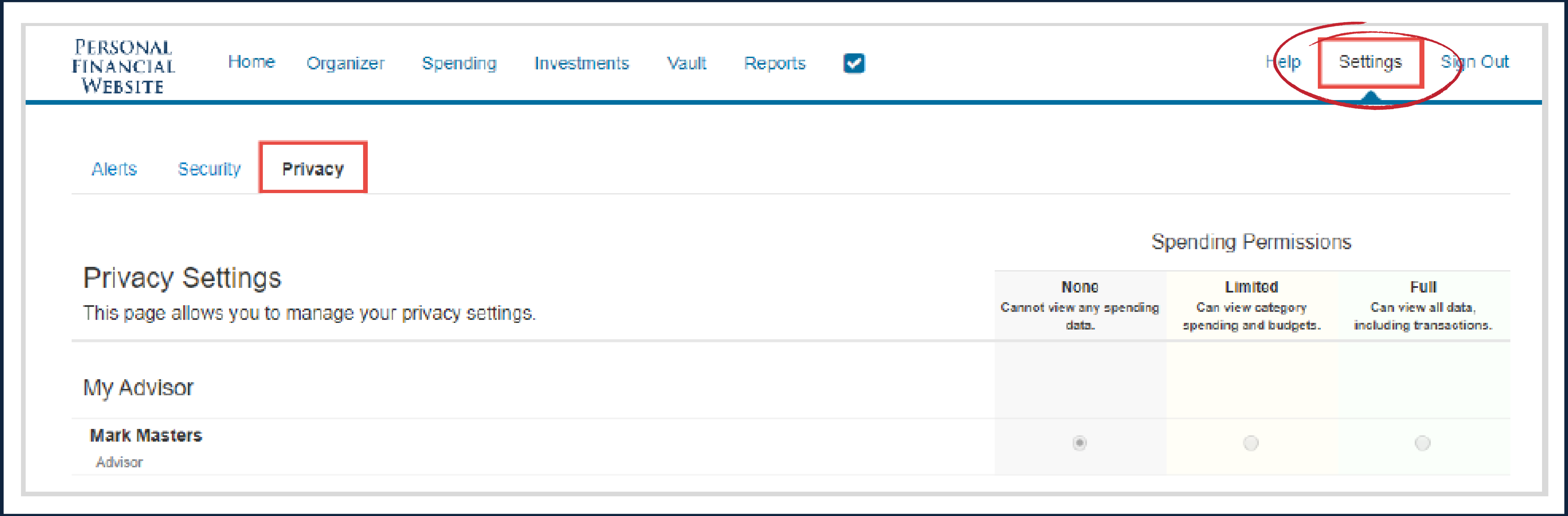
Privacy Settings



- Can change spending permissions to None, Limited or Full

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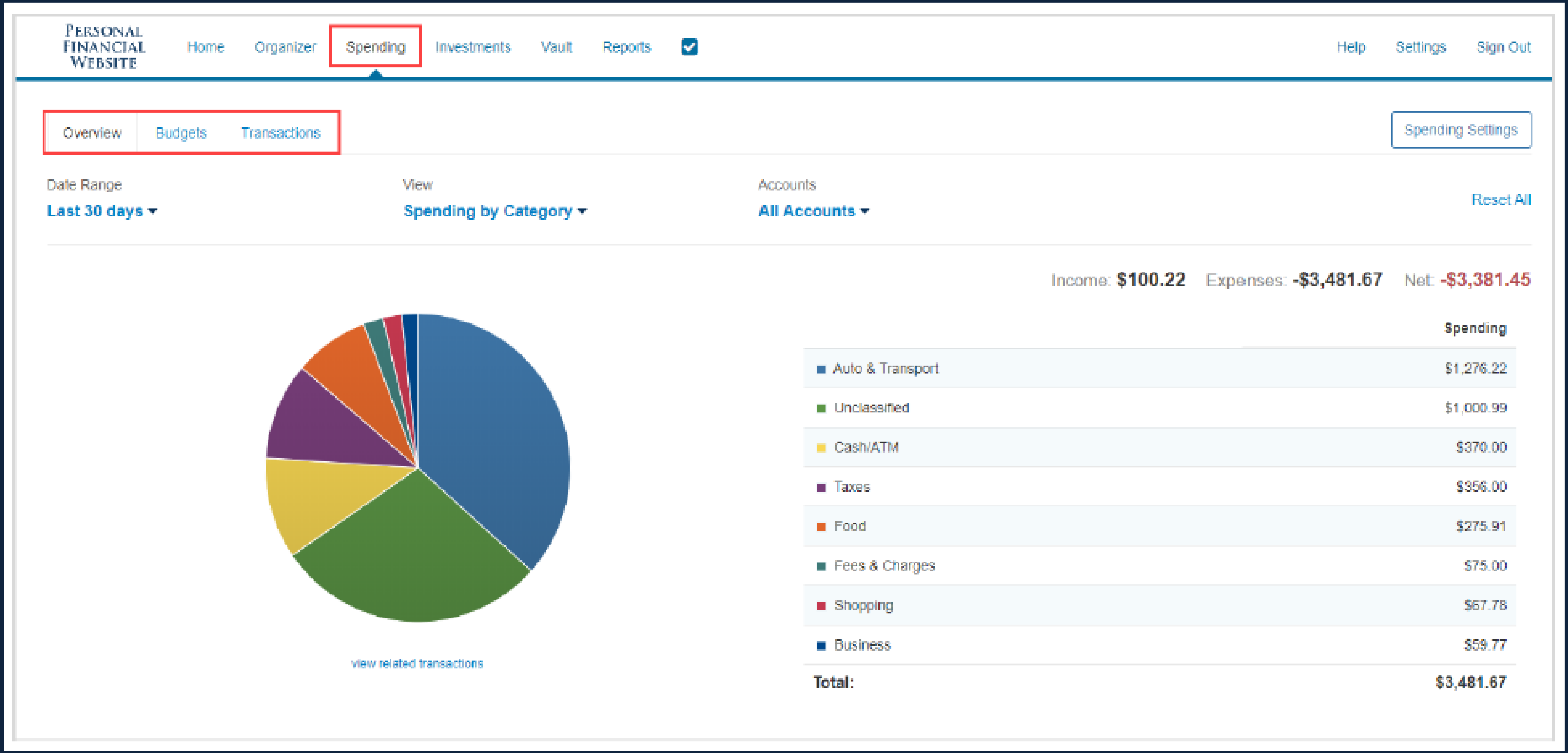
Spending Function: Overview



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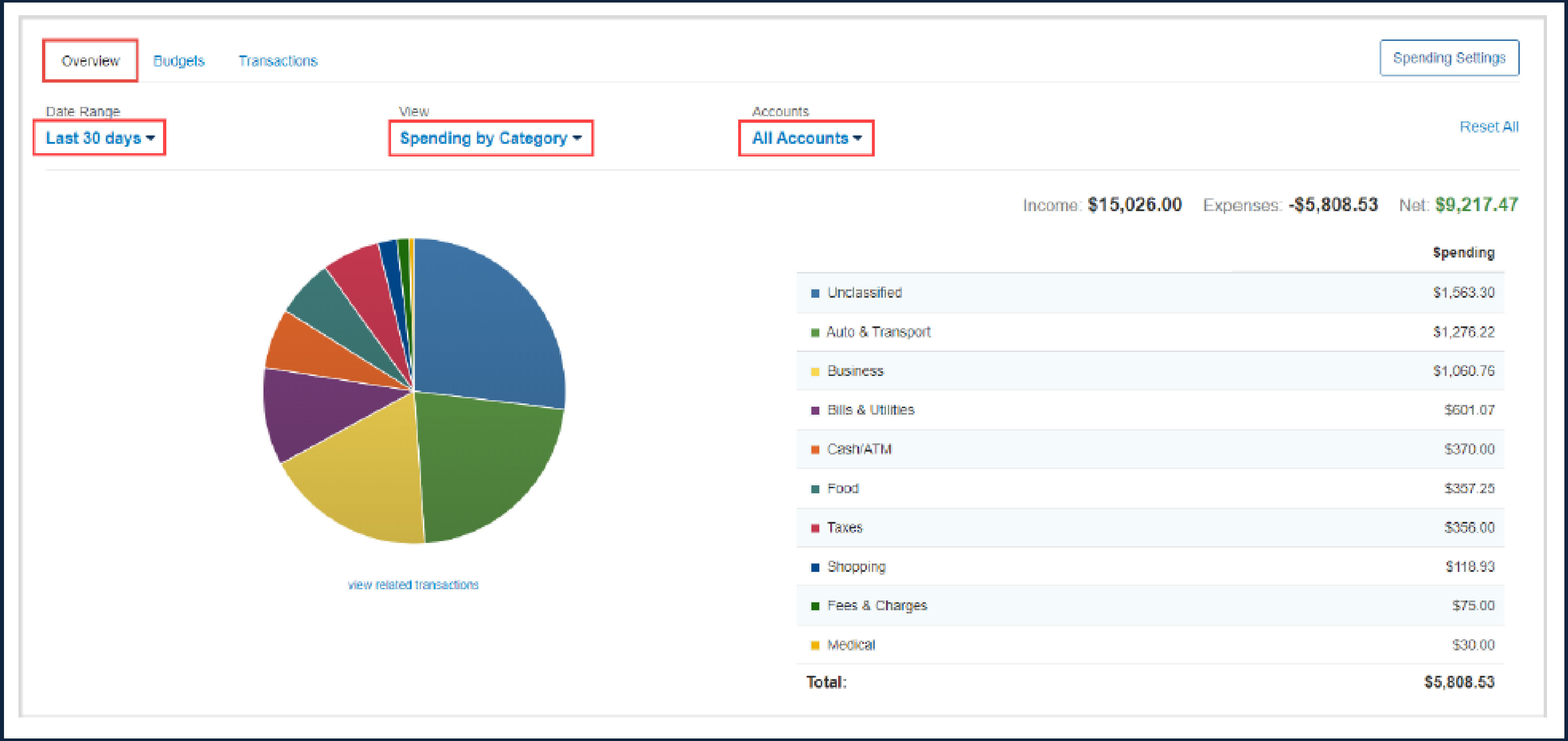
Spending Function: Overview



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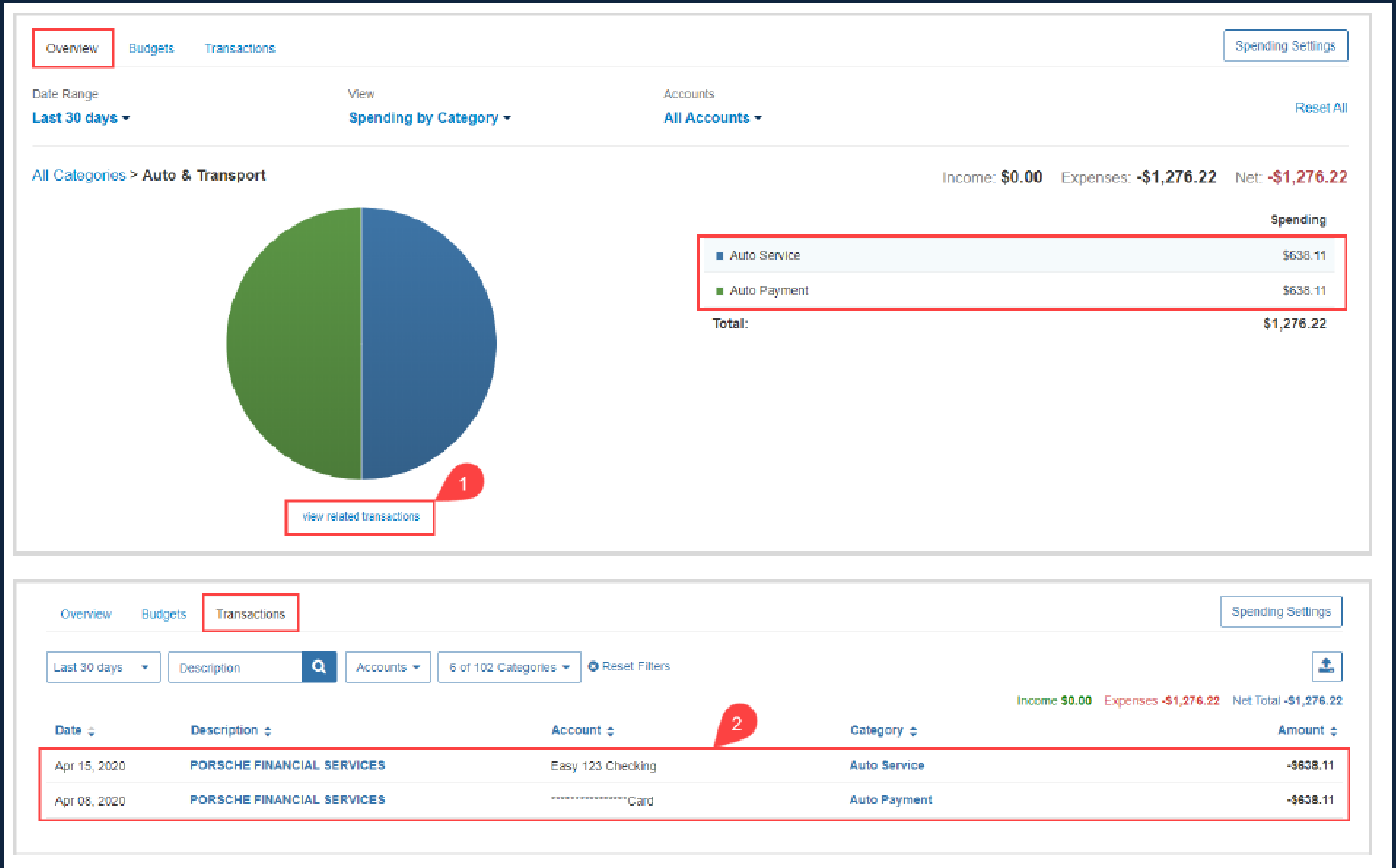
Spending Function: Overview



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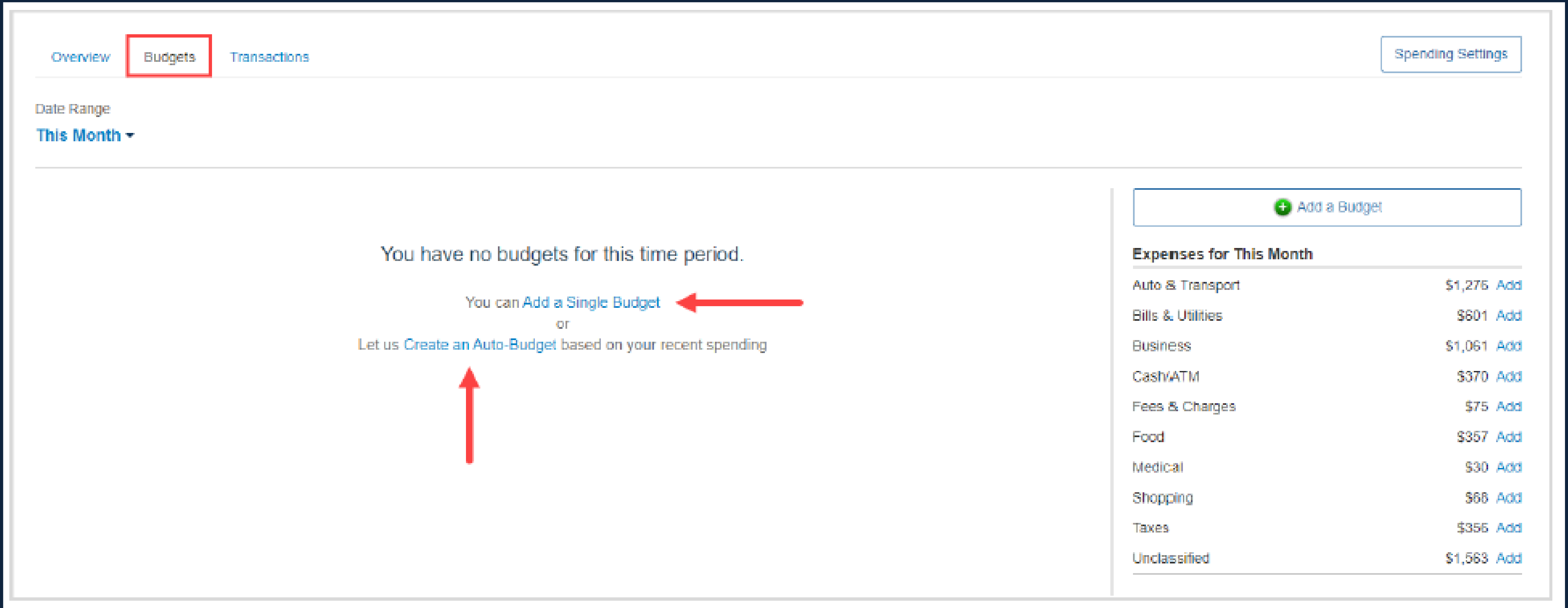
Spending Function: Budgets



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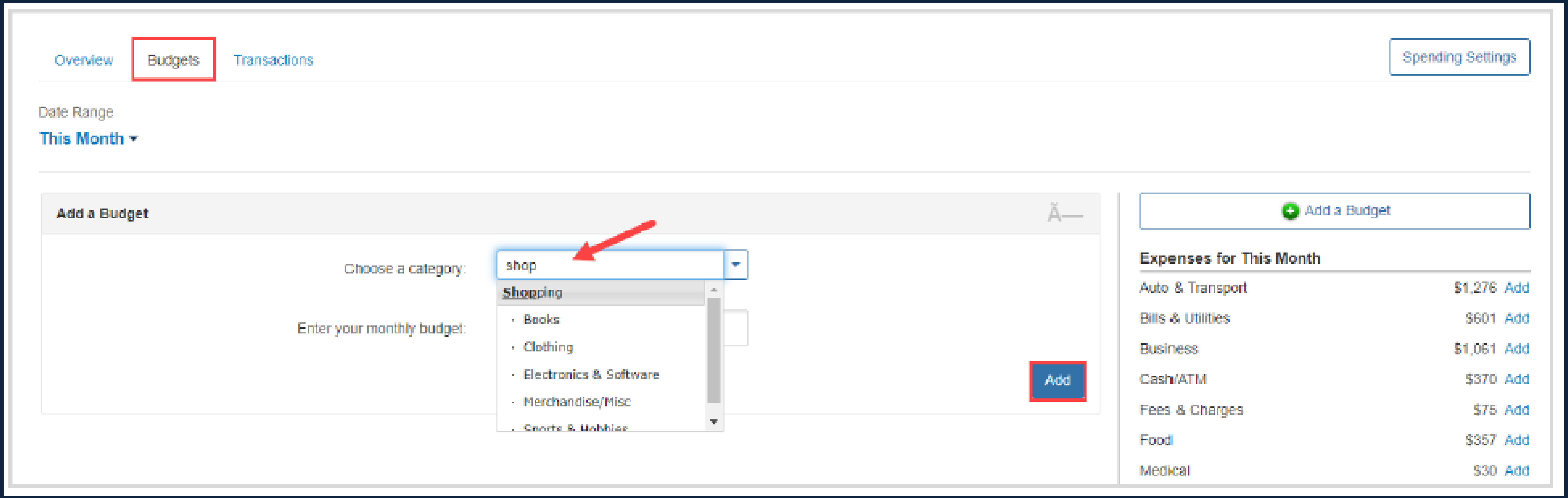
Spending Function: Budgets



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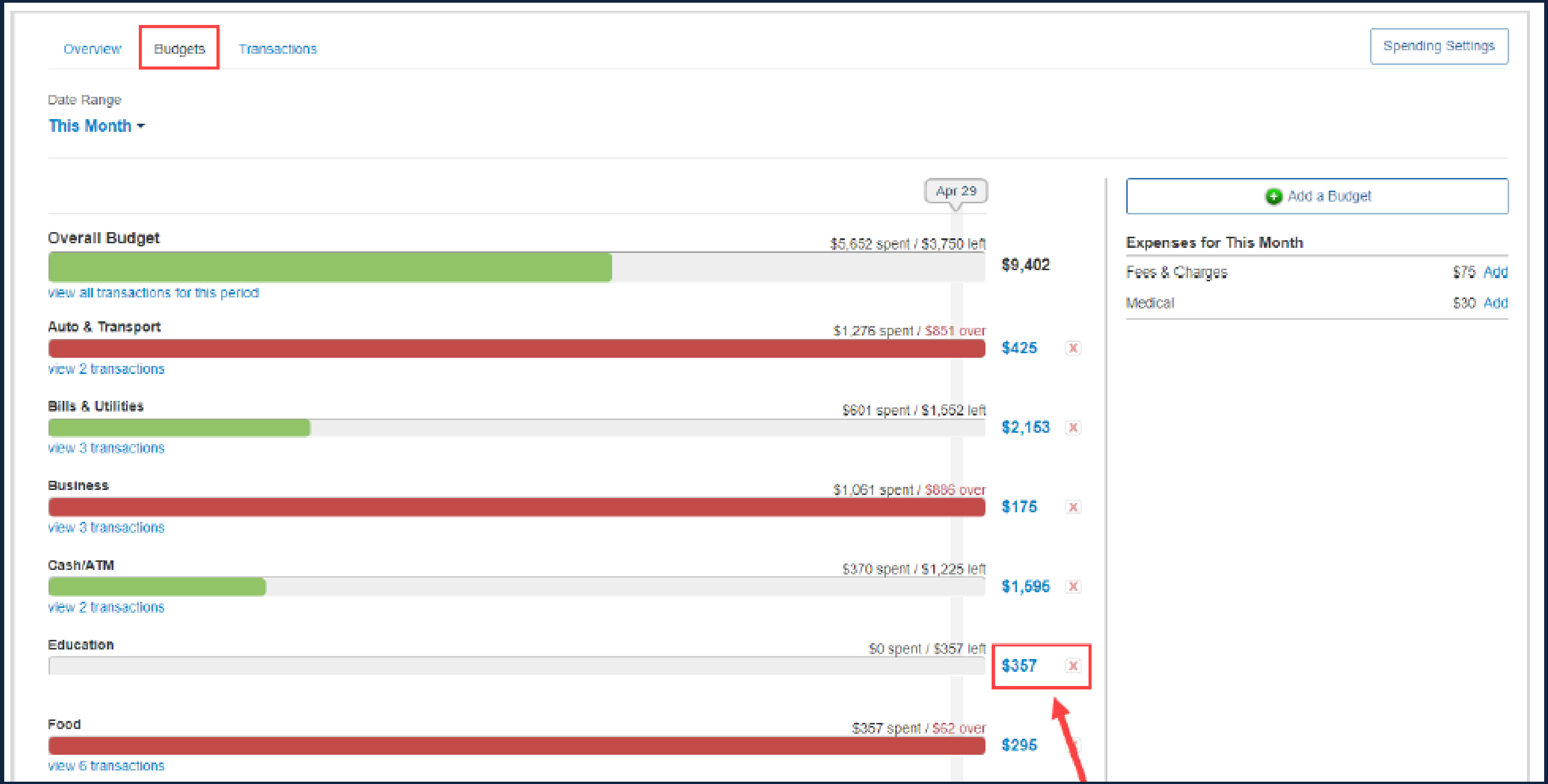
Spending Function: Budgets



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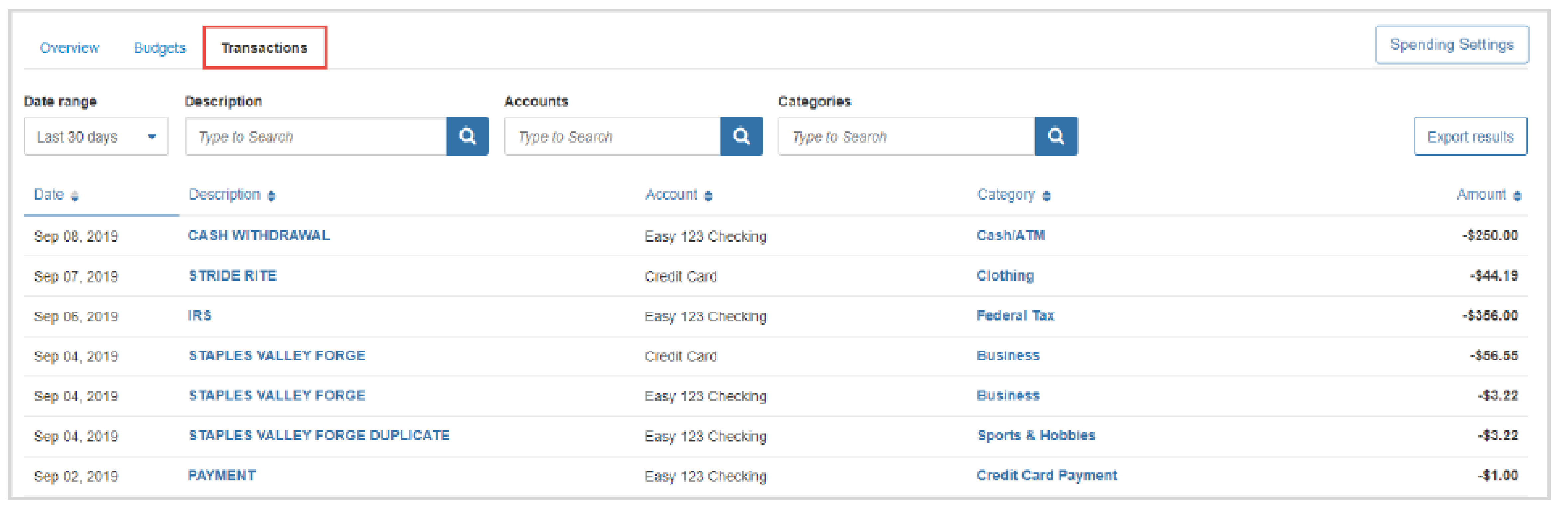
Spending Function: Transactions



Date	Description	Account	Category	Amount
Sep 08, 2019	CASH WITHDRAWAL	Easy 123 Checking	Cash/ATM	-$250.00
Sep 07, 2019	STRIDE RITE	Credit Card	Clothing	-$44.19
Sep 06, 2019	IRS	Easy 123 Checking	Federal Tax	-$356.00
Sep 04, 2019	STAPLES VALLEY FORGE	Credit Card	Business	-$56.55
Sep 04, 2019	STAPLES VALLEY FORGE	Easy 123 Checking	Business	-$3.22
Sep 04, 2019	STAPLES VALLEY FORGE DUPLICATE	Easy 123 Checking	Sports & Hobbies	-$3.22
Sep 02, 2019	PAYMENT	Easy 123 Checking	Credit Card Payment	-$1.00

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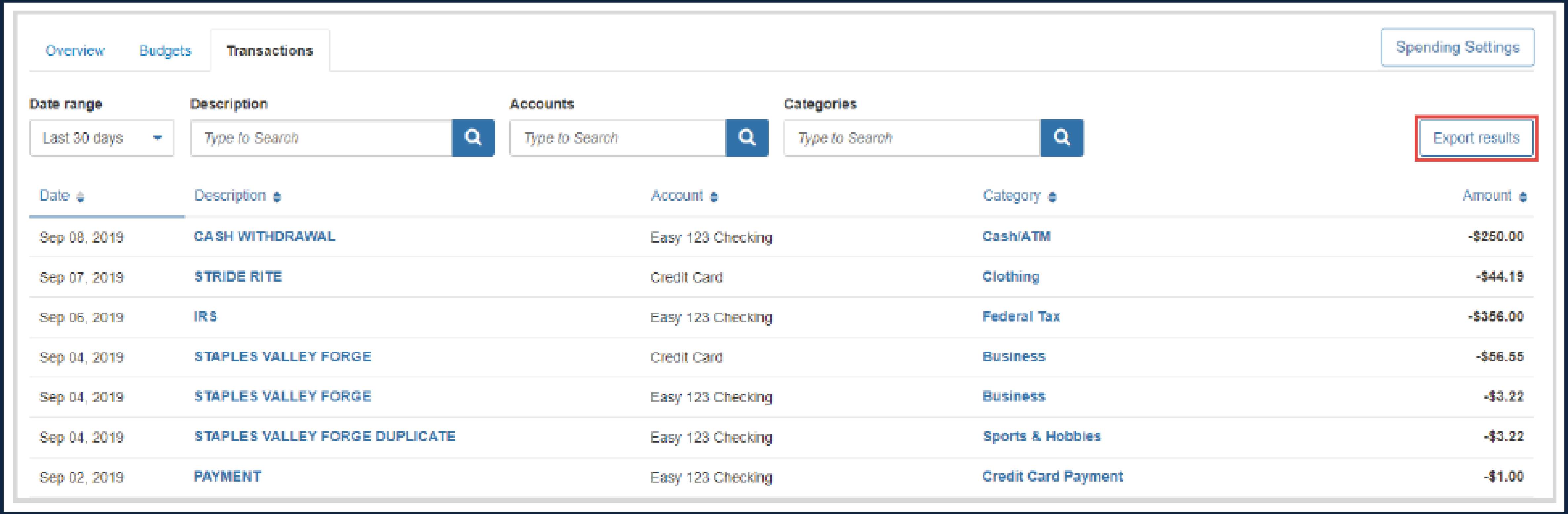
Spending Function: Transactions



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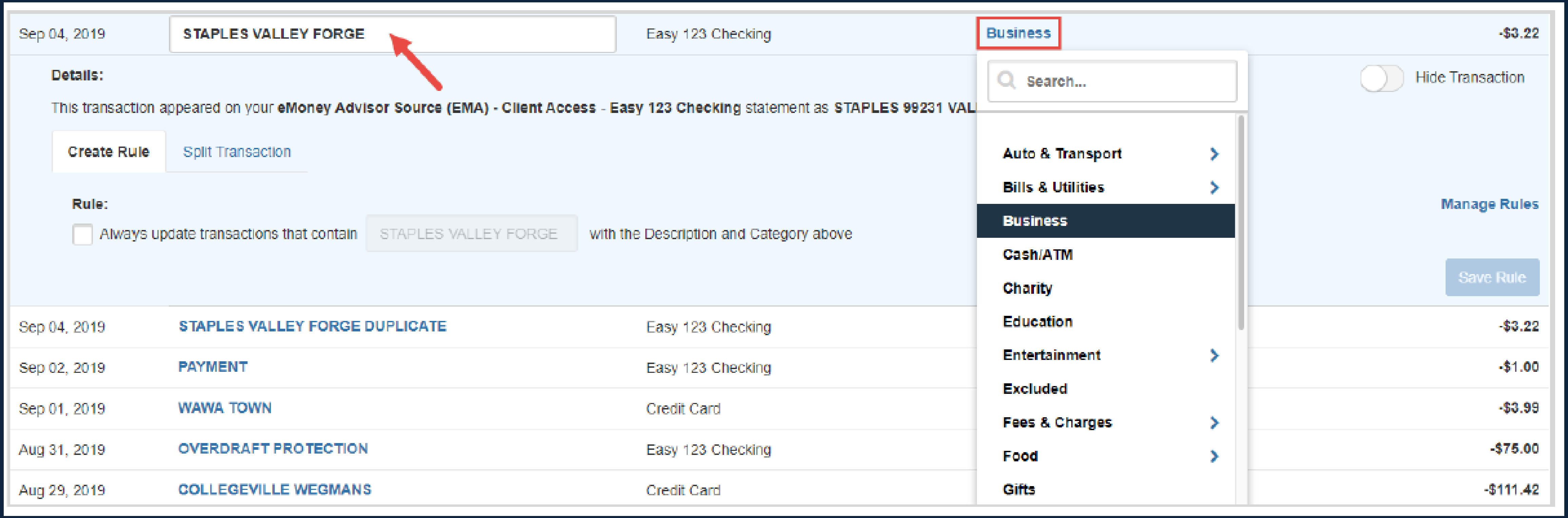
Transactions Function & Rules



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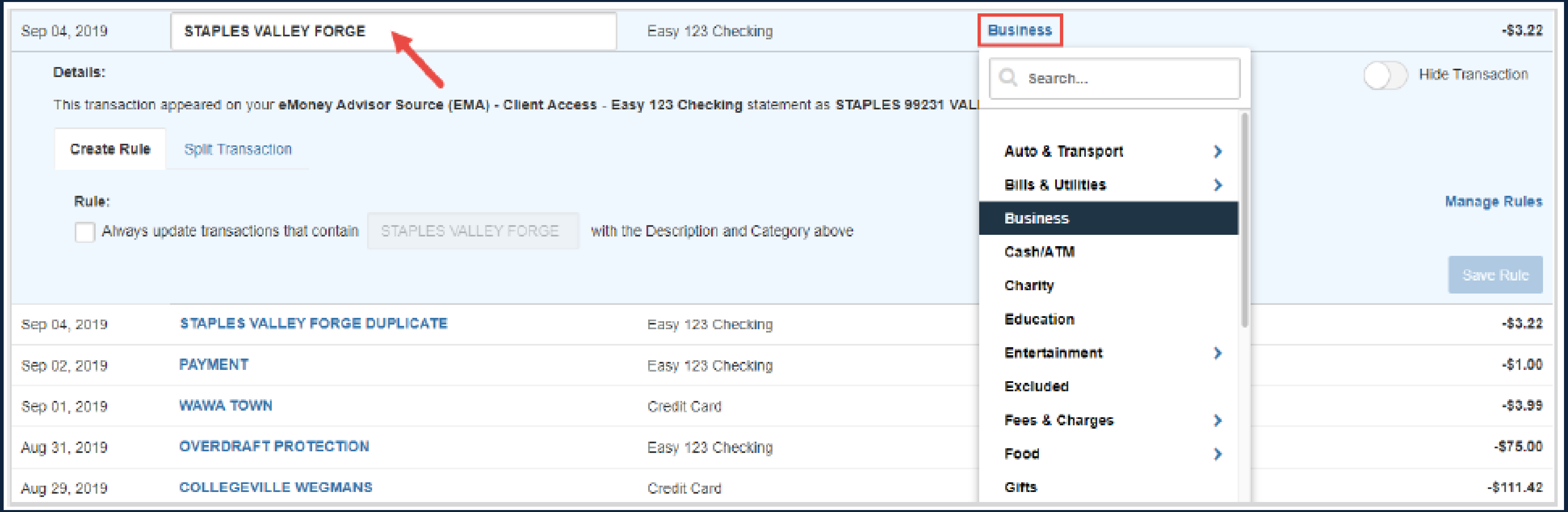
Transactions Function & Rules



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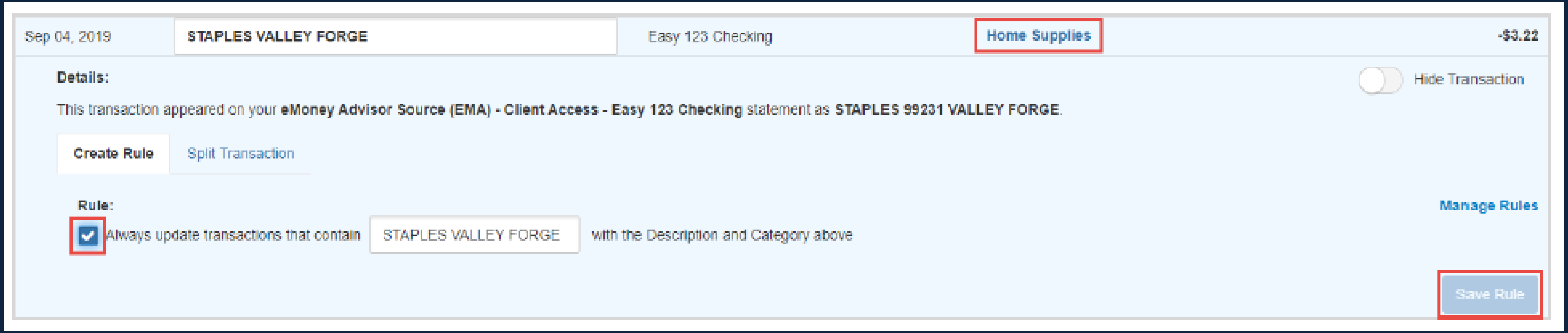
Transactions Function & Rules



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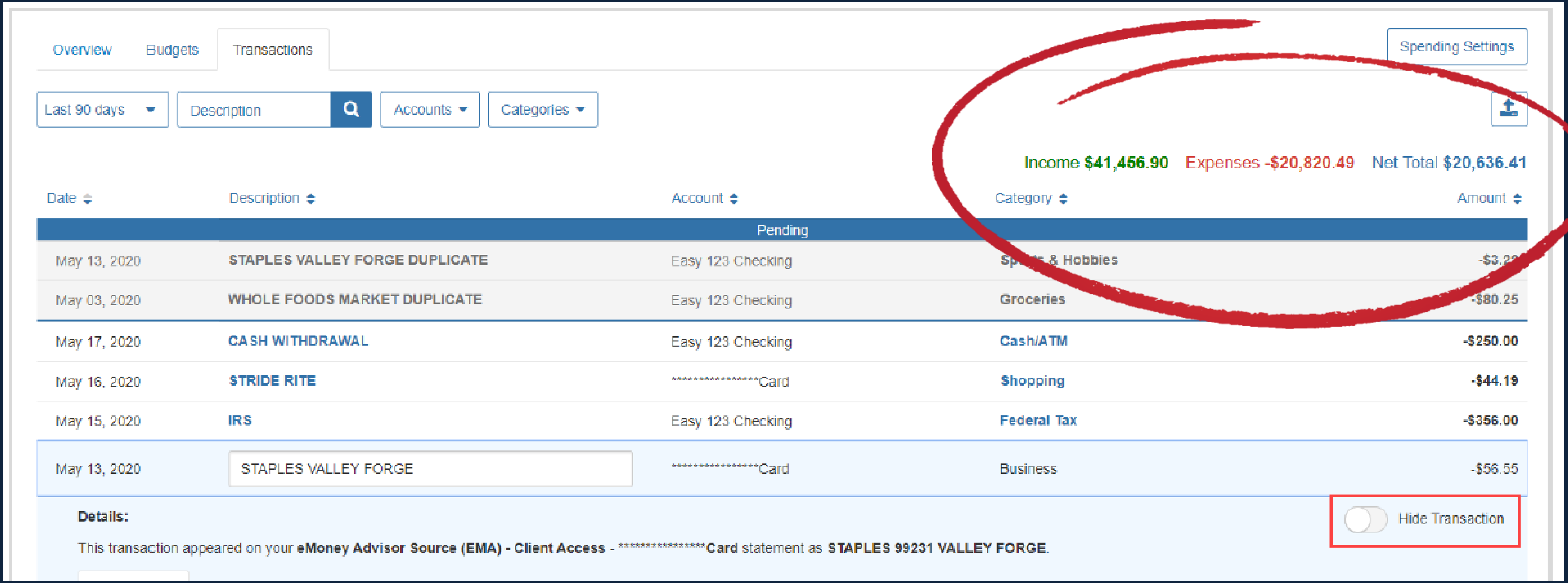
Transactions Function & Rules



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Transactions Function

Overview | Budgets | Transactions

Spending Settings

Date range: Last 30 days

Description: Type to Search

Accounts: Type to Search

Categories: Type to Search

Export results

Date	Description	Account	Category	Amount
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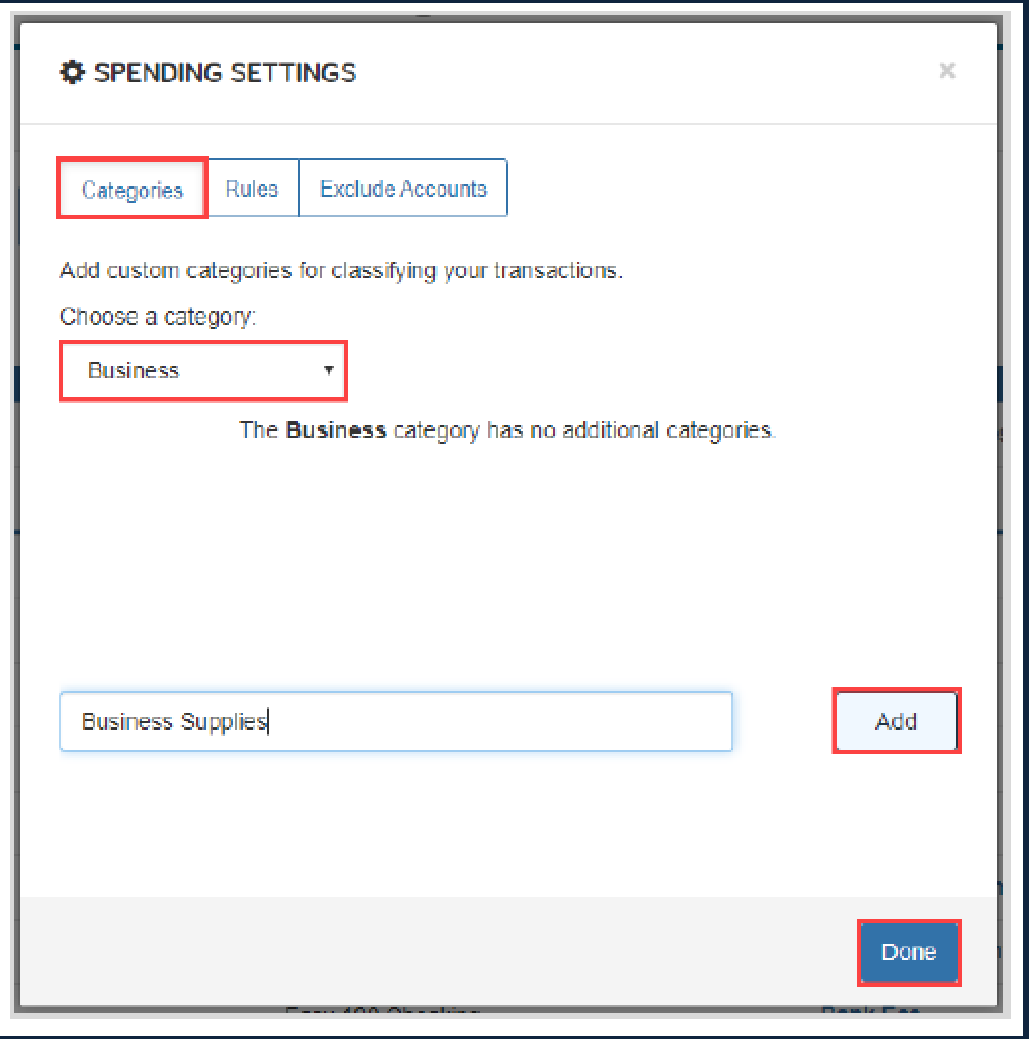

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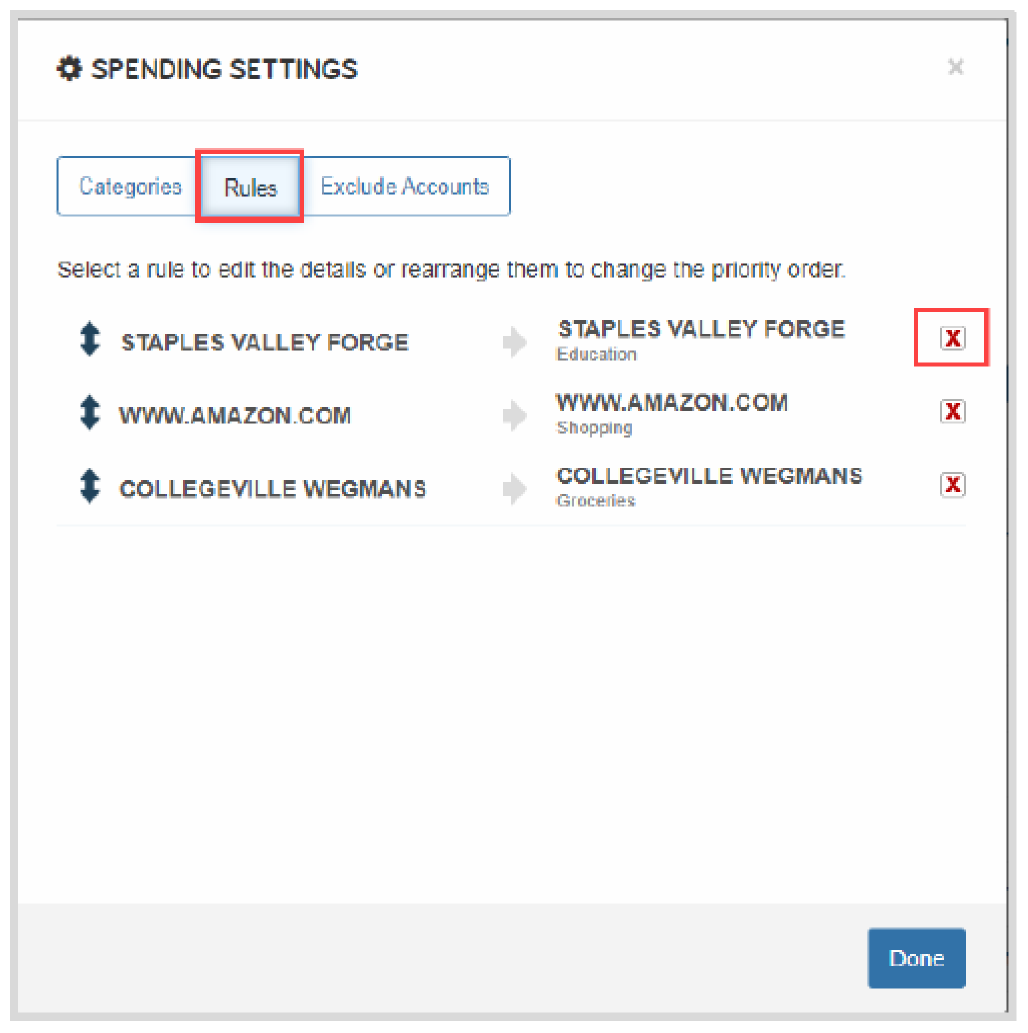

"A budget is telling your money where to go instead of wondering where it went."

DAVE RAMSEY

EMPTY NESTIN'

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On Demand Access

A GUIDE TO YOUR CLIENT PORTAL

On Demand Access

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Client Portal Assistance Available

Berkeley Meredith, CFP®
Financial Advisor

Elise Dwyer
Client Relations Manager

(703) 669-3660 | clientservices@h4fs.com

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WEDNESDAY LUNCH & LEARN

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- 9/9: Politics & Markets: What Happens During a Presidential Election

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- Fundamentals of Investing 102: Make Your Money Work For You
- Your Savings Alone Won't Pay for College: Financial Strategies to Get on Track for College with an update on the impact of COVID-19

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If you have questions about this presentation, please contact us at:
(703) 669-3660 or clientservices@h4fs.com

Hughes Financial Services, LLC, is an independent Registered Investment Adviser (RIA) that works closely with individuals and families, helping them to accomplish their unique financial goals through the allocation of their assets. We are a fee-only firm that seeks to adhere to the highest fiduciary standards and provide clients with advice that is truly unbiased and has only our clients' best interests in mind.

We offer our clients an impressive wealth of expertise in retirement and estate planning, investment and risk management, insurance, and education planning. Our advisers hold a variety of professional designations and certifications and are well versed in a number of financial disciplines. Our combined education and experience allows us to proudly offer you independent financial advice that you can trust.

SOURCES: eMoney.com; Gallup; lifehack.org

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