



My Financial Advisor

Frequently Asked Questions:

What Does My Dashboard Show? This depends on the accounts you have imported into My Financial Advisor and whether you have created budgets or goals. The more financial accounts you import into My Financial Advisor, the more you can track and control from one place!

Adding Accounts

- [Add an Online Account](#)
- [Add an Offline Account](#)

Transactions:

- [Track Transactions](#)
- [Add a Custom Transaction Category](#)
- [Add a Rule to Rename Transactions](#)
- [Change How Transactions Are Categorized](#)
- [Split a Single Transaction into Different Categories](#)

Budgets and Financial Goals:

- [Create a Budget](#)
- [Create a Financial Goal](#)
- [Create an Alert](#)

Reports and Questions:

- [Run a Report](#)
- [Get Help Online](#)

Still Have Questions?

[Get Help Online](#), or call Freedom's Member Service Center at **800-440-4120**.