

Personal Financial Management Made Easy

We're excited to let you know that on March 20, 2018 industry leading *MX Money Management* will replace *FinanceWorks* as your financial management and budgeting tool within online banking. This will happen close to the same time we release the updated online banking look and feel which provides a more responsive banking experience across all device types. *Money Management* offers an updated look and user experience, with higher levels of accuracy in spending analysis and trending. The new Money Manager will also be available inside of our Mobile Banking application so you can access the information on the go.

New Money Management Features

In addition to the services available through *FinanceWorks*, *Money Management* will give online and mobile banking users the ability to:

- Access financial management services on the CBTx Mobile App in addition to online banking.
- Connect to even more of your financial accounts, giving you a full picture of your finances all in one place.
- Experience the best auto-categorization for spending available, including a broader range of spending categories to help better refine your budget.
- Set a budget or let *Money Management* develop a budget based on normal spending patterns. View your budget at-a-glance via a visual bubble chart.
- View detailed net worth analysis and tracking.
- Set savings, retirement and debt payoff goals and monitor your progress.
- Receive text and mobile alerts in addition to email.
- View a personalized cash flow calendar.

[Click here for a video overview of Money Management](#)

FinanceWorks Users: What to Expect

If you currently use *FinanceWorks*, here are a few things you should know about this transition:

- The upgrade will take place on March 20, 2018. As of this date, *FinanceWorks* will no longer be available.

- Your outside accounts should carry over from *FinanceWorks* to *Money Management*; however, for security reasons, your login credentials will not be transferred. You will need to re-enter your login credentials for outside accounts when you begin using *Money Management*. *Money Management* will look back 90 days for transactions that occurred since the migration, so we recommend reentering your login credentials within 90 days.
- The upgrade will migrate up to 18 months of your *FinanceWorks* data to the new system.
- The spending widget that currently appears on the online banking home page is being replaced with an interactive budgets widget. You will still have the ability to access spending trends within *Money Management*.
- *FinanceWorks* transaction categorization will not be migrated. This will allow *Money Management's* auto-categorization tool to categorize transactions more accurately with an expanded list of category options. If you have custom categories we recommend you print these to add back after the migration.
- Alerts, budgets and goals will not be migrated, but *Money Management* does offer these same features in a more robust format with additional options.

We know quick and convenient access to financial information is a priority for our customers and we hope this new, complimentary service makes managing your finances even simpler. We offer the latest online and mobile banking tools to ensure you can access your account information whenever and wherever you need to.