

Setting up Round Up for Goal and Charitable Cause

Use the following steps to set up Round Up for Goal and Charitable Cause.

Step	Action
1	From the landing page, scroll down to My Savings Center .
2	Tap the Manage > arrow from My Auto-Savings.
3	Scroll down to Goal section.
4	Tap the Add Auto-Savings button.
5	Tap the Round Up for Savings > arrow to round up your debit card purchases for savings.
6	Tap the Yes, I want to Round Up! button.
7	Tap the dropdown arrow to Select Account to Round Up from.
8	Tap the dropdown arrow to select Goal or General Savings to Transfer the roundup savings to.
9	Review selected accounts, then Tap the Next button.
10	Confirm your Round Up Settings, then tap the Confirm settings button. A celebratory message displays.
11	Optional: Tap the Take me to my Savings Center button to navigate to your Savings Center.
12	Tap the Learn how to donate roundups button.
13	Review How to Round Up for Charity, then tap the Select charitable causes button. Featured charity: CHOC Foundation is pre-selected and is currently the only charity option.
14	Optional: Tap the Learn more hyperlink to learn about this charity.
15	Tap the Select this charity button.
16	Review About this charity to learn about CHOC Foundation, then tap the Next button.
17	Tap and move the slider to adjust your split in any percentage between savings and charity.
18	Tap the Confirm my roundups button. A celebratory message displays.
19	Optional: Tap the checkbox to share contact information with the charity.
20	Optional: Tap the checkbox to set a limit on donations.
21	Optional: Tap the View my roundups for charity button.
22	Optional: Tap the View my roundups for savings button.