



Personal Finance Management FAQ's


What is Personal Finance Management (PFM)? PFM is a tool that allows you to connect, categorize and visualize your spending from multiple financial institutions (FI's) – internal and external – all in one place. PFM provides balances and transaction activity and offers you the ability to set budgets, create goals and view your outstanding debts, net worth and financial trends over time.

How do I enroll for PFM? Enroll in PFM by clicking on the Personal Finance menu option in the mega menu tool bar. You will receive a verification email requiring you to verify your email address by clicking on the link provided in that message. This action must take place in order for you to receive Personal Finance alerts. If you change your email address, a new verification email will be sent to both email addresses, requiring you to take action and click on the link provided to verify the newly added email address.

Is PFM safe/secure? Yes, you can access your data in a safe and secure environment. PFM is embedded directly within Personal eBanking and Mobile Banking. You can easily and securely view all of your accounts from multiple FI's.

Is there a fee for this service? No, this is an optional service provided to Personal eBanking customers if you choose to enroll in PFM.

Who should I contact for PFM Support? For support related to PFM, please submit a request to the MX Support team.

- Click on the question mark  located above add an account
- Click on Request Support

A PFM support specialist will communicate directly with you via email. The email will come from support@moneydesktop.zendesk.com. Please check your junk/spam folder if you do not receive follow up communication.


Is there a PFM User Guide available for me to use? A PFM User Guide can be found within the Personal Finance menu option in the mega menu tool bar. Please click on the 'Learn more about Personal Finance' link to access the guide. Select the 'Get Started with Personal Finance' PDF document, which was created by the MX Support team.

Am I able to link accounts from any other Financial Institution? You will only be able to link accounts from participating financial institutions. An error message will display when attempting to link your account if that FI does not participate in PFM.

What types of accounts can be linked through PFM? Checking, Savings, CD/IRA, Loans, Credit Cards, 401K, Mortgage Loans, etc.

How do I link my accounts through PFM?

1. Click '+ Add an Account' at the upper right-hand corner of the Personal Finance page.
2. Click on your financial institution's name or enter your financial institution's name in the search menu.
3. Find and select your financial institution.
4. Enter the same user name and password you use to access your selected FI account information online.
Note: Out-of-band Authentication will vary depending on the security your financial institution has in place.
5. Once we successfully connect with your other financial institution, we will link all of the accounts you have with them. Normally about 90 days of transaction history is available, however this history is based on the other financial institution.
Note: An existing online profile must be established for each third party account before the accounts can be linked to Personal Finance.

How much data will be available through PFM? PFM pulls up to 90 days of transaction history when accounts are linked. Subsequently, it pulls up to 15 days of transaction history when accessing the Personal Finance landing page. To download your transaction history, click on the 'Export transactions to CSV' icon  in the upper right-hand corner of your Transactions menu.

How often is account data updated through PFM? Account data is automatically updated upon accessing PFM.

What browsers and operating systems are supported for PFM? The PFM supported browsers are:

Browser	Version	PC Support	Mac Support
Chrome™	30+	Yes	Yes
Internet Explorer®	11	Yes	N/A
Microsoft Edge	13+	Yes	N/A
Firefox®	27+	Yes	Yes
Safari®	10+	No	Yes