Using Your Stashboard: FAQs

Welcome to your personalized Stashboard! This is your place to track everything related to your chosen financial purpose, from savings goals to real-time account updates. As a knitter, I like to joke that smart people manage their stash. Here at Castle Rock, this statement makes all the difference for clients finding the peace of mind they seek.

Engaging with your Stashboard is the single-best way to follow through on the goals you've set for you and your family. After all, you can't manage what you can't see. It's comprehensive and easy to use, but—like any tool—it's only as helpful as you make it.

Here are the top 3 questions clients ask me about their Stashboards. Master these tips, and you'll be be on your way to feeling ownership over your money, rather than the other way around.

Question #1: How do I access my Stashboard?

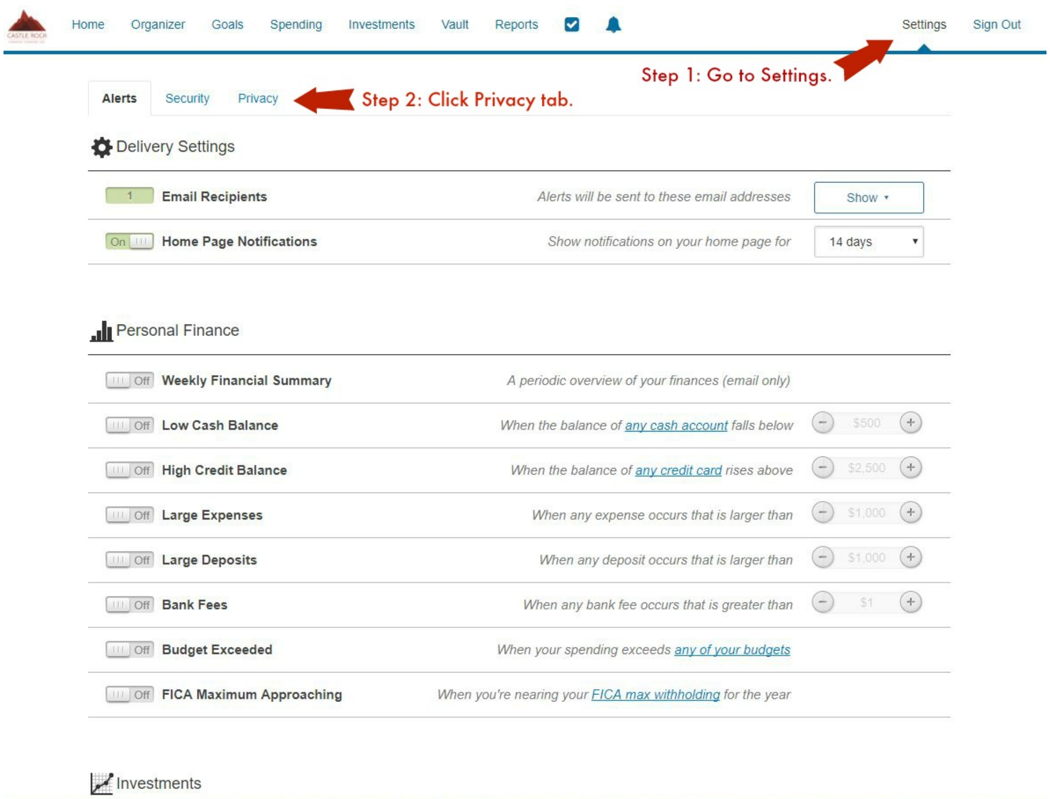
So, first things first! To use your Stashboard regularly, you'll need to access it easily. Some clients bookmark it on their computer, others prefer it on their mobile device, and everyone is free to use both.

After your first meeting with me, I'll email you a link to your login page.

Question #2: How do I share my budget and spending with Lauri? Spending is a Stashboard category clients find helpful, along with Goals, Reports, and Investments. Spending displays your budget and tracks cashflow accounts like credit cards. Whether or not you share these items with me is entirely up to you.

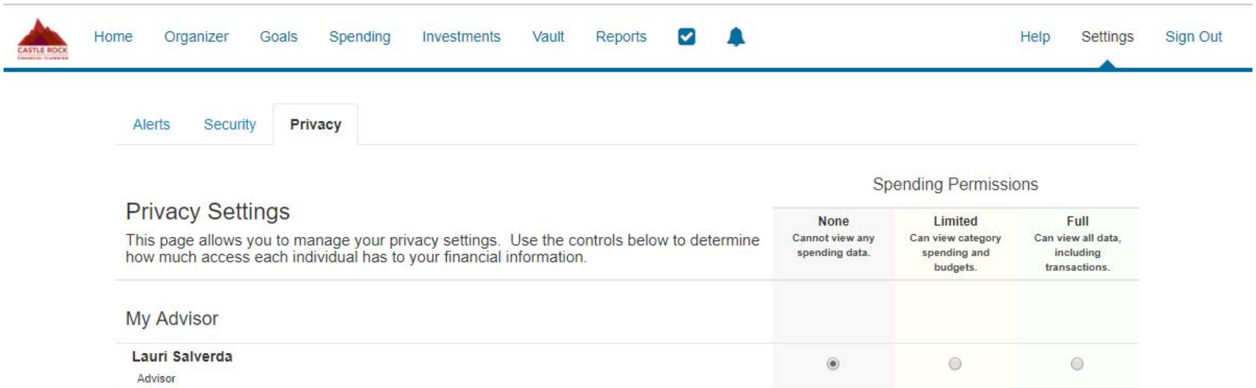
If you do choose to share your spending category with me, follow the steps shown here.

- **Step 1: Go to the Settings tab in the upper right.** Click it.
- **Step 2: Click the Privacy Tab.** This takes you to a page that allows you to choose which parts of the Stashboard are private to you, and which you want to share with me.



- **Step 3:** Select the button that reflects the level of access you want to give me—None, Limited, or Full.
  - *None* means I cannot view any of your spending data.
  - *Limited* means I can view your categories Spending and Budgets
  - *Full* means I can view all data on your Stashboard, including transactions.

STASHBOARD
A smart way to manage your finances



Question #3: If my bank doesn't link to the Stashboard, is the tool still useful to me? In short, yes. If you're a member of a credit union or smaller bank, it's possible the Stashboard can't link to your account. Even if this is the case, the Stashboard can still serve as your one-stop-shop for organizing documents and seeing your overall financial picture. More of my clients are using the vault feature to store their documents, so they can access them anytime, anywhere.