**Worksheet**

**Alerts and Notifications**

Electronic banking alerts let you keep tabs on the activity in your financial accounts. You can set up all kinds of banking alerts to get notifications about your finances.

Here are just 12 types of alerts you can receive based on the details of your checking, savings or credit accounts:

- When any purchase is made online, by phone or by mail.
- When a transaction exceeds a pre-set amount.
- When your balance get close to your credit limit.
- When a cash advance is taken on your account.
- When a purchase occurs outside the United States.
- When your statement is available.
- When your payment is about to come due.
- When your payment posts.
- When your balance hits a predetermined level.
- When a refund is credited to your account.
- When a deduction is made from your account.
- When your cash balance is running low.

Use this worksheet as a starting point to consider the types of notifications you want to routinely receive about your financial accounts.

**Remember:** The purpose of alerts is to give you more insights into your finances.

By using alerts, you can better manage your money, keep track of your spending, help avoid late charges or overdraft fees, and more quickly spot financial fraud.

**NEXT STEPS**

Check your bank’s app or website to learn what type of alerts they offer for your account. Then set up alerts that will help you keep better track of your finances.