



Video Transcript: My GreenInsights | Budget & Planning Tools

Note:

Optimistic piano music begins to play.

On screen: Regions Logo appears with text below: Budget & Planning Tools

[Voice-over] We're bringing you Budget & Planning tools in Online Banking and on the go.

On screen: A pie chart scales up in the center of the screen with a total amount of \$3,818.01 in the center of the chart. Several rectangles containing names of different bank accounts fade in and move across the screen. Bubbles representing budgets also move on screen with different budget types listed in each bubble, including vacation, moving expenses, food & dining, bills & utilities and entertainment.

[Voice-over] My GreenInsights is an easy, simple and secure way to see where you stand.

On screen: A laptop slides in from the right and into the middle of the frame while all elements fade out except for the pie chart, which scales back into the laptop containing the Online Banking "Insights" page. A mobile device also slides into frame to the right of the laptop containing the same page.

On screen: The "Business Services" section of the pie chart is selected, then selected again to dive deeper into the budget categories. All subcategories are shown on the right in the desktop view.

[Voice-over] When you link your outside accounts, you get a full picture of your finances in one central place.

On screen: The page on mobile device moves up to the "Add and Link Account Info" button. On desktop, the mouse selects the "Accounts" tab then the "Add an Account" button.

On screen: The "Continue" button is selected on both devices.

[Voice-over] Manage your money from anywhere.

On screen: A video of a close-up of a woman looking at her mobile device on a busy street fades in. A green angled rectangle slides up from the bottom of the screen with text reading, "Manage your money from anywhere."

[Voice-over] You have multiple accounts. Many expenses. And lots of ideas on what to do with the money you work so hard to save. Combine your spreadsheets, notes and spending activity to...

On screen: A video of a man and a woman sitting at a desk filled with stacks of paper fades in. The woman is using a calculator looking at papers. The man is on a laptop.

On screen: Colorful rectangles with account alerts fade in over the video.

[Voice-over] ...get a grip on your finances.

On screen: A video fades in of a man standing in a building stairwell looking at the My GreenInsights budget pie chart on his mobile device. The background is a busy city street.

[Voice-over] Whether you tap into Online Banking or our mobile app, everything you need is at your fingertips.

On screen: The background fades to green while a laptop slides into the frame with the Online Banking home page on the screen. The mouse selects the "Insights" tab. Then, the My GreenInsights "Spending" page is shown on screen with a transactions pie chart labeled with various Spending categories.

On screen: A mobile device slides in on the right side of the screen displaying the same transaction information as the laptop within the "Budget & Planning Tools" section of the mobile app.

[Voice-over] With My GreenInsights, it's easy to link and sync accounts. Securely.

On screen: Laptop slides out of frame while the mobile device scales up to the center of the frame. The "Add and Link Account Info" button is selected. Then, the "Connect your account" page is shown.

On screen: Text reading "Your information is protected with bank-level security" is highlighted.

[Voice-over] Filter and customize your view of transactions.

On screen: A video fades in of a man using his card at a coffeeshop to make a transaction.

On screen: Several colorful rectangles representing different bank accounts fade over the video. The "Filter Accounts" bar is on the right side of screen displaying all accounts.

[Voice-over] Track spending habits by category.

On screen: A video fades in of a person looking at their mobile device. The Spending pie chart with total amount animates in the center of the screen over the video.

[Voice-over] Each transaction is automatically categorized...



On screen: The “Business Services” section of the pie chart is selected. Then, the spending category list fades in to show the Business Services total alongside other spending categories.

On screen: The Business Services category is selected again to dive deeper into that category. Another pie chart animates in the center of that chart with a more detailed list of that specific category. The list on the right changes with those categories.

[Voice-over] ...though you can review and adjust the category to suit your needs.

On screen: A transactions list fades in over the video. An “uncategorized” category is selected within the list, and the “Select a Category” screen slides in over the transaction list. The “Business Services” category is selected to change to that category.

[Voice-over] View spending trends over time...

On screen: A chart containing several spending categories fades in over the video. A mouse hovers over two categories to show category type and amount.

[Voice-over] ...and monitor how your money is moving.

On screen: The background screen fades to white. A monitor slides into the center of the screen containing the My GreenInsights “Cash Flow” page with a calendar.

On screen: The monitor fades out while a mobile device fades in and scales into the center of the screen displaying the “Cash Events” page.

[Voice-over] We help you to be budget-savvy.

On screen: A new mobile device slides into frame with the “Plan Ahead” page. Various bubbles representing spending budgets move around in and out of the mobile device.

On screen: A video of a small family who just moved into their new home surrounded by moving boxes fades in. The budget bubble titled “Moving Expenses” moves to the center of the screen.

[Voice-over] See ways to save.

On screen: A video of a dad and his child sitting on a couch watching TV fades in. A screen slides in over the video displaying the Entertainment category with its sub-budgets listed below. The budget bubbles move around the rectangle. Red lines cross out two of the sub-budgets.

[Voice-over] Set spending targets.

On screen: A video of a bunch of people sitting at a restaurant fades in. The “Food & Dining” bubble moves to the center of the screen over the video.

[Voice-over] And, get notified before overspending.

On screen: An opaque rectangle fades in over the video while the “Food & Dining” bubble moves to the left of screen and a notification message slides in next to it. The message reads, “You’re projected to spend \$75 more than you’ve budgeted for Food & Dining. You’ve already spent \$250.00 of \$500.00.”

[Voice-over] Simulate payoff plans for loans.

On screen: A video of a man sitting inside a brand-new parked car fades in. A salesman enters the vehicle holding a tablet device. A screen showing a debt chart fades in over the video. A mouse selects “Fastest Payoff First” from the dropdown menu and the chart changes.

[Voice-over] Set your goals for savings or paying off debt.

On screen: A video of a family sitting in their new home fades in with the “Select Goal Type” overlay screen. The mouse selects the “Savings” option. The “Save for...” categories slide in and the mouse selects the “Home” category. The “Create a New Goal” screen slides in and displays a savings amount, goal name and account that can be customized.

[Voice-over] If you’re not already using My GreenInsights, it’s easy to get started. Tap into our Budget & Planning Tools to activate, link and customize information for a clear view.

On screen: The background screen fades to green while a mobile device spins into the center of the frame with the “Budget & Planning Tools” page. The mobile device scales back slowly and the “Get Started” button is selected. The “Manage Linked Accounts” page is displayed. The device continues to scale back as the page slides up and fades to the Budgets pie chart.

[Voice-over] Regions My GreenInsights provides personal financial management...

On screen: A video of kids jumping off a boat into a lake fades in. Two budget bubbles float in over the video. One bubble contains the Vacation category and the other contains the Food & Dining category.

[Voice-over] ...in sync with your life.

On screen: A video of a family sitting in their new home surrounding by boxes fades in. The bubbles remain on screen while a new Moving Expenses bubble fades in over the video.

[Voice-over] Get the app for your Android or Apple device and get started today.

On screen: A close-up of a man looking at his phone sitting on a couch fades in. The phone contains the Regions app icon. The man selects the app icon.



On screen: The background fades to white. A mobile phone rotates up on screen containing the Regions log in screen. The App Store and Google Play logos fade in on the right.

On screen: Screen fades to white with the Regions logo and disclosures.