



# Organize your finances

John Hancock's **personal finance organizer** makes it easy to manage your financial life

If you're like most people, you have accounts in a variety of financial institutions—but it's hard to keep track of it all. John Hancock's **personal finance organizer** lets you link all your accounts quickly, easily, and securely, so you can manage your entire financial picture in one place.

**A plan for your financial well-being can help you focus on priorities, minimize stress, and keep your finances on track**

In a recent survey<sup>1</sup> of John Hancock retirement plan participants:

- 56% said they'd save more for retirement if they could manage their financial priorities better.
- 68% of workers are concerned about their finances adding stress to their life.

## How does the personal finance organizer work?

Our personal finance organizer provides you with a comprehensive view of your savings, debt, and spending, and allows you to set goals to help you build a bridge from your finances today to the financial situation you'd like to achieve.

Link all of your financial accounts to the personal finance organizer—from retirement plans, credit cards, mortgages, and loans—to:

- Track your spending monthly and by category
- Sort transactions by institution, account type, or even your own subcategory—such as household expenses or a child's college finances
- Use the search and filter capabilities to find specific transactions
- Set goals for emergency savings, a new car, a vacation—and more

<sup>1</sup> John Hancock's ninth annual stress, finances, and well-being survey, John Hancock, Edelman Public Relations Worldwide Canada Inc. (Edelman), December 2022. This information is general in nature and is not intended to constitute legal or investment advice. Edelman and John Hancock are not affiliated, and neither is responsible for the liabilities of the other. This report presents the results of research conducted by Edelman on behalf of John Hancock. This was an online survey of 3,825 John Hancock plan participants. The survey was conducted from 11/29/22 through 12/14/22.

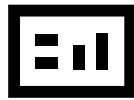




Create a budget



Set goals



Track your spending



Discover spending habits



Get a real estate valuation



### Organize your finances—organize your life

Log in to your retirement account at [myplan.johnhancock.com/financeorganizer](https://myplan.johnhancock.com/financeorganizer) to get started!



Personal finance organizer is a data aggregation tool available to you through the John Hancock website. By using personal finance organizer, account access information for any non-John Hancock accounts that you add will be stored by a third-party service provider for the purpose of providing the service. John Hancock is fully committed to safeguarding your information; however, you are responsible for maintaining the confidentiality of passwords and other login information and for following prudent online practices. Personal finance organizer is only reflective of the accounts that you have linked, and John Hancock is relying on the accuracy of the information provided by the linked financial institution(s). Additional information can be found in the important information document, available online.

The content of this document is for general information only and is believed to be accurate and reliable as of the posting date, but may be subject to change. It is not intended to provide investment, tax, plan design, or legal advice (unless otherwise indicated). Please consult your own independent advisor as to any investment, tax, or legal statements made herein.

John Hancock Retirement Plan Services LLC provides administrative and/or recordkeeping services to sponsors or administrators of retirement plans through an open-architecture platform. John Hancock Trust Company LLC provides trust and custodial services to such plans. Group annuity contracts and recordkeeping agreements are issued by John Hancock Life Insurance Company (U.S.A.), Boston, MA (not licensed in NY), and John Hancock Life Insurance Company of New York, Valhalla, NY. Product features and availability may differ by state. All entities do business under certain instances using the John Hancock brand name. Each entity makes available a platform of investment alternatives to sponsors or administrators of retirement plans without regard to the individualized needs of any plan. Unless otherwise specifically stated in writing, each entity does not, and is not undertaking to, provide impartial investment advice or give advice in a fiduciary capacity. Securities are offered through John Hancock Distributors LLC, member FINRA, SIPC.

NOT FDIC INSURED. MAY LOSE VALUE. NOT BANK GUARANTEED.

© 2024 John Hancock. All rights reserved.

MGTS-P 551260 02/24-551260

MGR0119243329357 | 551260

## Our personal finance organizer lets you link to thousands of institutions

- Retirement accounts
- Healthcare spending accounts
- Brokerage
- 529 plans
- Savings accounts
- Credit cards
- Checking accounts
- Personal loans
- Mortgages