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Getting Started Guide

This guide walks a new subscriber through setting up KASH for the first time: creating an account, subscribing, connecting a brokerage account, setting a savings goal, and tracking contributions.

Note: Screens below are from a real account; balances, holdings, and the connected brokerage's name have been blurred for privacy. Your own numbers will appear in their place.

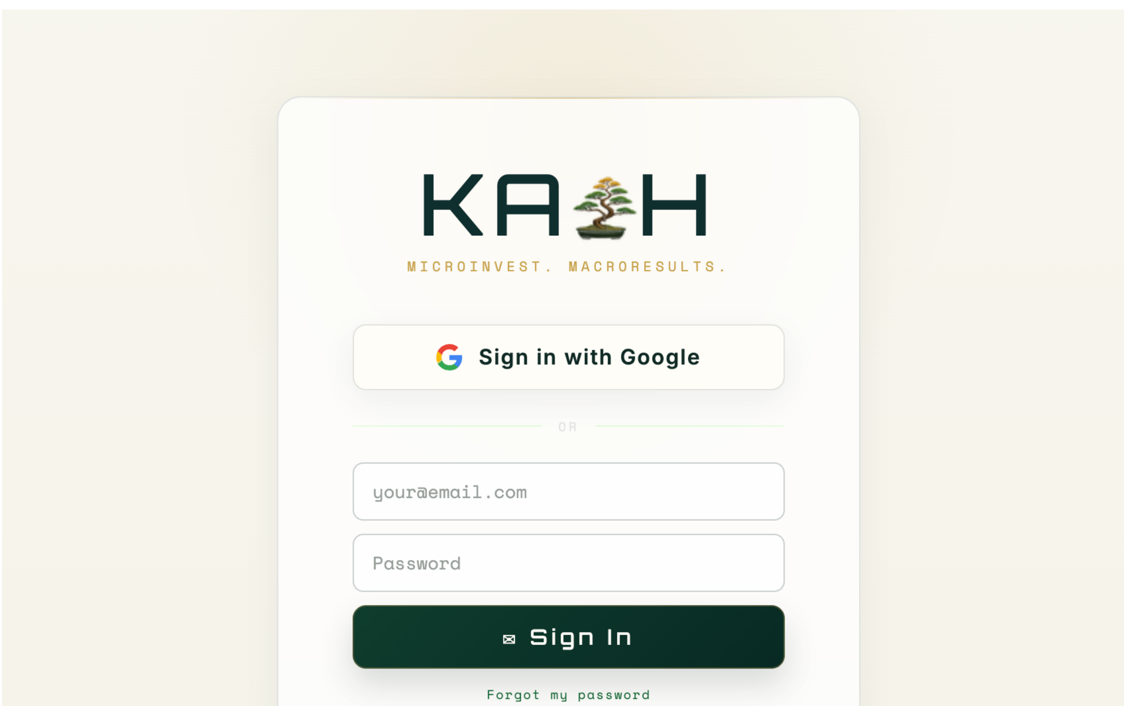
1. Create your account

1. Go to kashsolutions.us and click Subscribe on the home page.
2. Sign up with your email and a password, or continue with Google.
3. Read and check the box agreeing to the Terms of Service and Privacy Policy.
4. Complete the subscription (billed securely through Stripe).

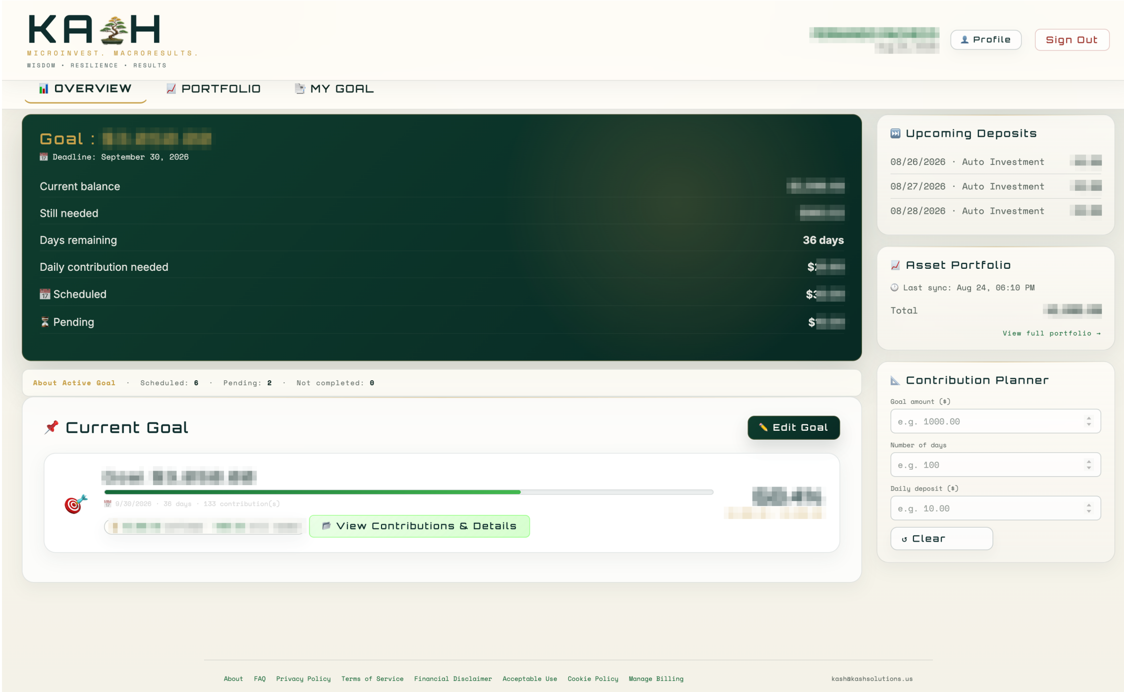
Note: Cancellation is always self-service, from your own Stripe billing link — no need to contact support to cancel.

2. Sign in and explore the Overview tab

Once you're signed in, KASH opens on the Overview tab. This is a quick snapshot of your goal progress and portfolio, with shortcuts to the other two tabs: Portfolio and My Goal.



Sign-in screen

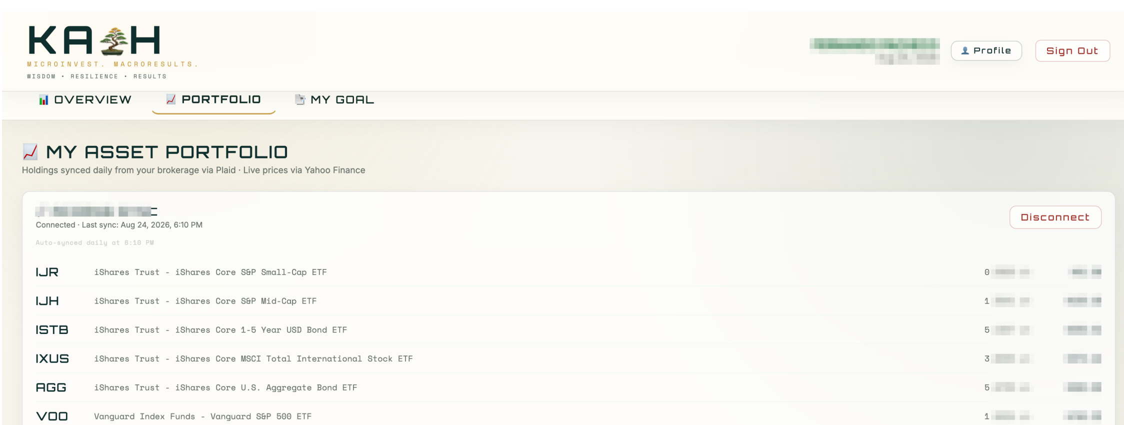


Overview tab

3. Connect your brokerage account

1. Open the Portfolio tab.
2. Under Brokerage Sync, click the Connect button.
3. A secure Plaid window opens — search for and select your own brokerage there, then log in with your brokerage credentials (KASH never sees or stores your brokerage password).
4. Once connected, your holdings sync automatically every business day, and you'll see your real positions listed with live prices.

Note: KASH connects to brokerages through Plaid, which supports a wide range of institutions. You can disconnect at any time from the same screen.



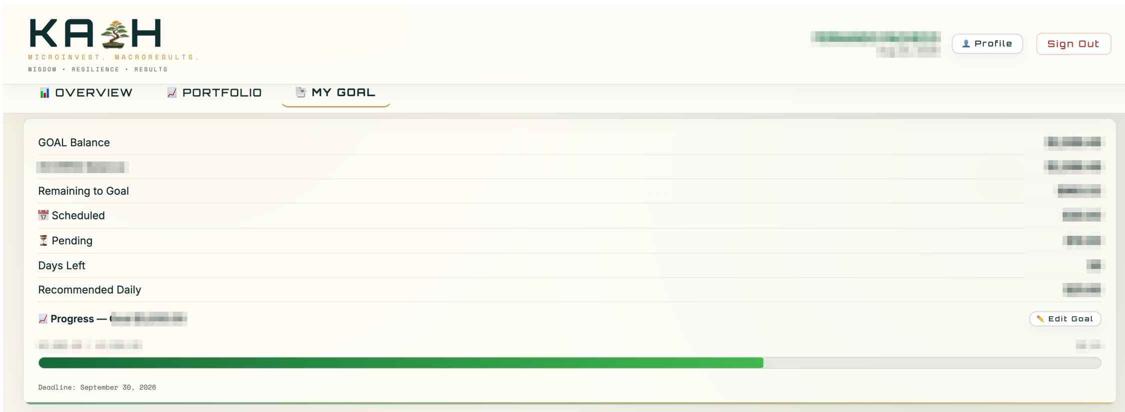
Portfolio tab, connected to a brokerage

4. Set your savings goal

1. Open the My Goal tab.

2. Click “Set your first goal!” (or “Set Goal” if you already have one).
3. Enter your target amount in dollars and a deadline date.
4. Click Save Goal.

KASH uses this to calculate the pace you need to save at to reach your goal by the deadline.

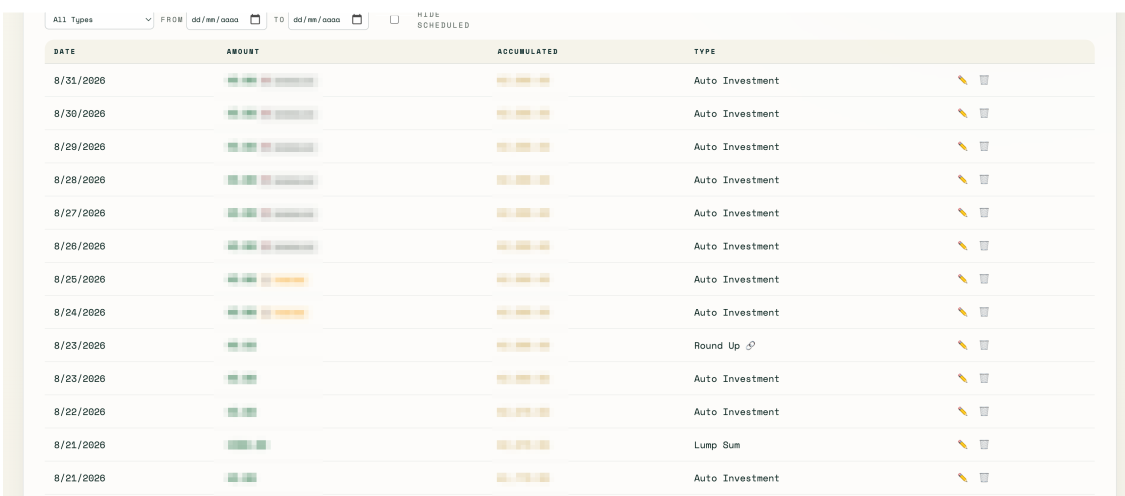


My Goal tab: progress toward your target

5. Track your contributions

KASH reads your brokerage statement and suggests each transaction it finds — deposits, dividends, fees, taxes, withdrawals — so you decide what counts toward your goal:

- Click “+ Add” next to a suggestion to include it. Deposits and dividends add to your goal; fees, taxes and withdrawals only reduce your goal if you consciously add them — they are never applied automatically.
- Click “✖ Reject” to permanently dismiss a suggestion you don't want to include.
- You can also add a manual entry yourself with the “+ Add Transaction” button, for anything not already suggested from your statement.



Contribution history

6. Track your portfolio performance

Once your brokerage account is connected, KASH automatically displays your portfolio performance in the **Portfolio** tab — no CSV upload is required.

The **Asset Portfolio** section shows your portfolio value at the last sync, **YTD performance**, and **1 Year performance**.

Below, you can see each holding with its current market price and daily change. The **Performance by Holding** table provides a detailed view of each investment, including **Price, Today, YTD, and 1 Year** performance.

Portfolio performance, automatically calculated from your connected brokerage holdings

7. Managing your subscription

You can manage or cancel your subscription at any time through the secure Stripe billing link available on your account screen. Cancellation takes effect at the end of your current billing period.