



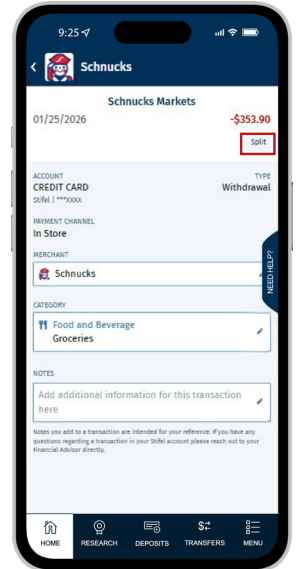
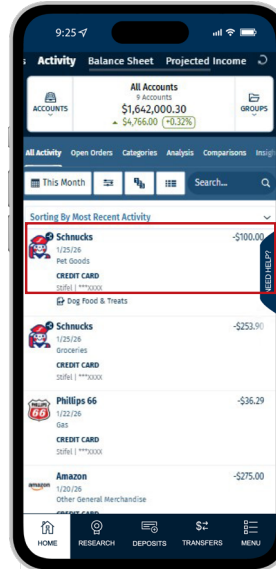
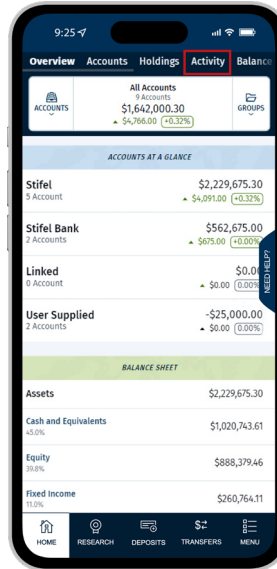
Take Control of Your Financial Life

Split Transactions let you **split** a single transaction into multiple parts, so you can categorize your spending more accurately. This is ideal for purchases that include different types of items (e.g., groceries + household supplies), shared expenses, or transactions that require partial reimbursement.

How to Access Split Transactions

1. Log in to **Wealth Tracker** on your desktop or mobile device.
2. Navigate to the **Activity** subtab to view your recent transactions and cash flow.
3. Select the transaction you want to split.
4. Click the **Split** button in the upper-right corner.

Please Note: If you do not see the **Split** button when viewing a transaction, check to see if the transaction is still pending. Pending transactions cannot be split until they have fully processed. Split Transactions are available for most activity types, including Stifel Investment Activity, External Account Activity, StifelONE Debit Card Activity, and Stifel Credit Card Activity. In some cases, certain transaction types may not support splitting.

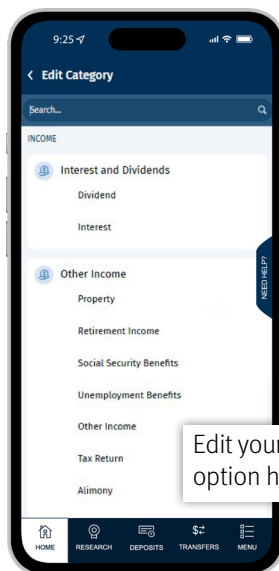
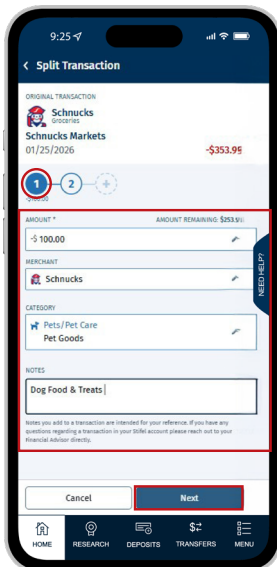


How to Split a Transaction

1

Enter Your First Split

- Enter the dollar amount you want to split from the original transaction.
- Edit the **Merchant**, **Category**, or **Notes** for this portion of the split if needed.
- Select **Next**.

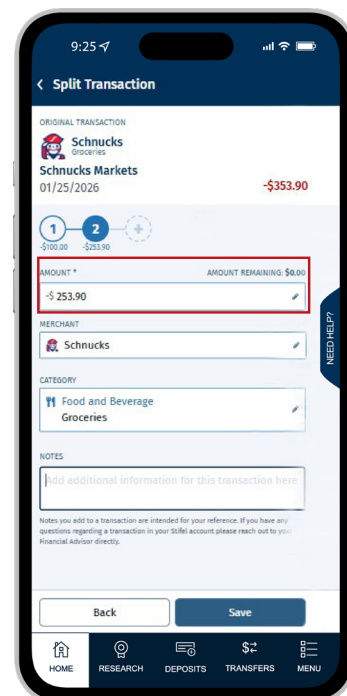


Edit your category option here

2

Review Remaining Amount

- The remaining amount will automatically populate on the next screen.

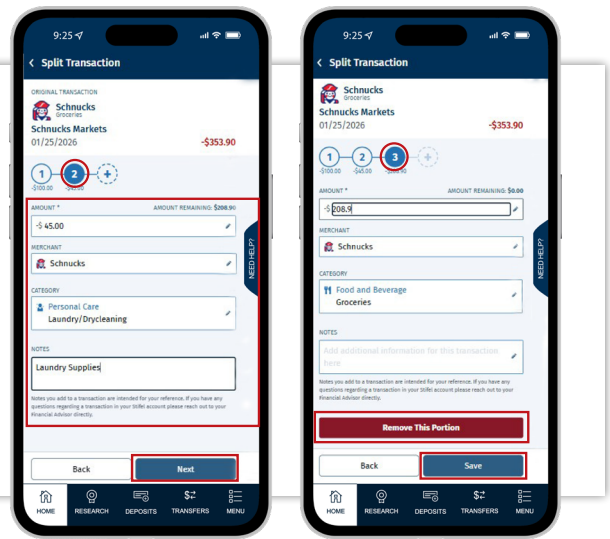


3

(Optional): Add More Splits

- If you need to split the remaining balance further:
 - Enter the next split amount.
 - Click **Next**.
 - Repeat these steps until all portions are added.
- Please Note:** A transaction can be split up to five times.

When finished, scroll down and click **Save** to apply your splits, or select **Remove This Portion** to undo any additional splits.



4

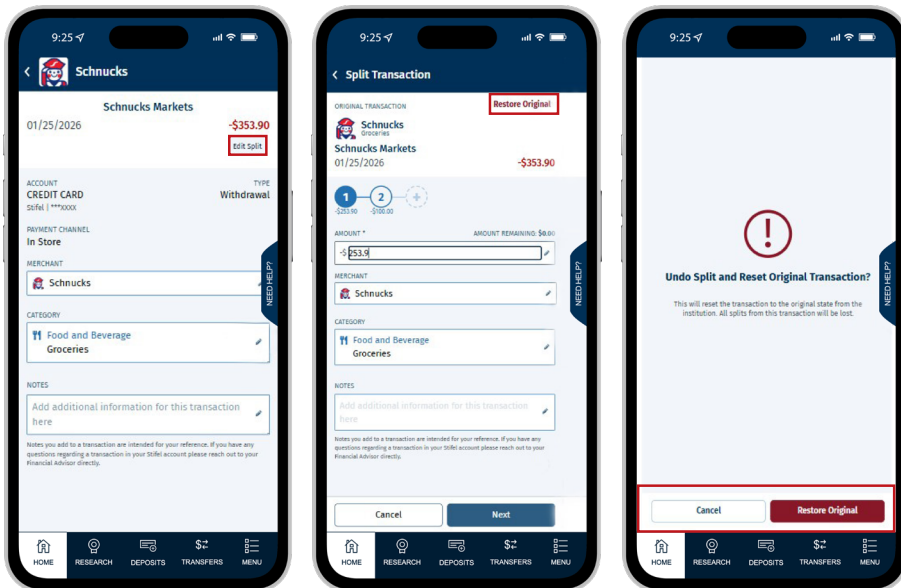
Finalize

- Review and edit the **Merchant**, **Category**, or **Notes** for the remaining amount.
- Click Save.

Your split items will now appear as individual transactions on your **Activity page**, each with its own category and detail.

Edit or Restore Original Split Transactions

- Select any of the split transactions.
- Choose **Edit Split** to adjust categories or amounts. *If you make edits, be sure to select Save when prompted to apply your changes.*
- Or choose **Remove Split** to restore the transaction back to a single line.
- Confirm by selecting **Restore Original** or choose **Cancel** to keep the current split.



When You Should Use a Split

- A purchase includes multiple types of items**
Example: groceries + household goods in a single store run
- You're tracking shared expenses**
Example: splitting a restaurant bill or household purchase
- Part of the purchase will be reimbursed**
- Example: work-related expenses within a personal transaction

Using Split Transactions ensures your Categories and Cash Flow pages remain clean, accurate, and meaningful over time.

Ready to get started?

Enroll or log in now
at tracker.stifel.com

Log In



Questions?

Contact Stifel Wealth Tracker at
(866) 697-8433 or wealthtracker@stifel.com.
For current support hours, scan the QR code
or visit stifel.com/tracker/contactus

