FIRSTWESTERNTRUST

Friends & Family Checklist

MYFW Digital Business Banking Platform Pilot

This checklist is designed to help you prepare for the upcoming digital platform conversion. To ensure you have all the necessary information for a smooth transition to the new platform, please follow these steps.

Important Dates & Times

Please refrain from making any updates or modifications to your templates and online banking services **starting November 21 through December 8.** Any updates made during this period may not transfer to the new platform. If you have questions or need assistance, contact your **Private Banker.**

6:00 PM MST on Friday, December 5th - Current system becomes unavailable.
6:00 AM MST on Monday, December 8th - New Digital Platform is live for pilot users.

Cutoff Times

Please ensure all transactions are submitted before the cutoff times below.

Bill Pay	Thursday, December 4	4:00 PM MST
ACH Same-Day Service	Friday, December 5	11:00 AM MST
Wire Transfers	Friday, December 5	3:00 PM MST
ACH Origination	Friday, December 5	3:30 PM MST
Remote Deposit Capture	Friday, December 5	6:00 PM MST
Mobile Deposit	Friday, December 5	6:00 PM MST
Internal Transfers Between Accounts	Friday, December 5	6:00 PM MST

Before December 5th | Prepare for the New Platform

☐ Verify Account Access

- Log in to the **current platform** to confirm your access and keep your account active.
- Contact your **Private Banker** if you're not able to access your account.

☐ Confirm Contact Information

Ensure your information is **accurate and up to date**. You can verify by:

- Logging into your current business banking account and reviewing your account settings, or
- Contacting your Private Banker directly

☐ Download Account and Bill Pay History

- **Export all account and bill pay history** for your records.
- **Historical data *will not* transfer to the new platform**. In order to retain your records, please follow this guide.

☐ Clean Up ACH and Wire Templates

- **Review and document** how your current templates are set up.
- Templates **will transfer** to the new platform; however, you will be required to **review and confirm** that all information is correct.
- **Remove** any unused templates to ensure a clean transition to the new platform.

☐ Review Users and Permissions

- Review **all active users** and their access levels.
- To retain access, inactive users must log in at least once before **December 5th.**
- Users who do not log in **will not transfer** to the new platform.

On December 8th | Log into the New Platform

☐ Receive Your Temporary Credentials

You will receive **two separate emails** on go-live day:

- **Temporary User ID**
- **Temporary Password**

Once both emails arrive, use the link in either message to access the new platform.

☐ Log in to the New Platform - Desktop Required First

Your first login must be completed on desktop using your temporary credentials.
After signing in, you will be prompted to create your new username and password.

Multi-Factor Authentication (MFA)
If you plan to use multi-factor authentication, you may download the **VIP Access app**.
This is required for **external payments and approvals**.

Current RSA Token Users

- Log in using your temporary credentials
- Desktop Browser: Go to "My Settings" and click on "Security Options" to set up your VIP (Token) Access
- Mobile App: Download the **VIP Access app** - this replaces the RSA Token app
- A **Company ID is no longer required**

Current Password Users

- Log in using your temporary credentials
- Follow the prompts to create your new login credentials
- A Company ID is no longer required

☐ Access the New Mobile App

After you've logged in on desktop and created your new credentials:

- **Delete** the **old mobile app** from your device
- Download the **MYFW Digital Banking app** from the App Store or Google Play
- Log in using your **new username and password**

After Logging In | Reestablish Preferences

☐ Reestablish Account Settings

- **Alerts & Notifications**
- **External scheduled recurring transfers**

☐ Verify Your Accounts and Permissions

- Confirm that **all account information transferred correctly.**
- **Review user permissions** for ACH, wires, and approval limits.
- **Primary and Secondary Admins cannot create new Secondary Admins.** If additional admins are needed, please contact your **Private Banker**.

☐ Review and Reestablish ACH and Wire Templates

- Templates will **carry over**, but should be **verified** for accuracy (recipients, limits, and approvers).
- ACH and wire transfers with an effective date **after December 5 will not be processed**, and will need to be reestablished in the new platform.

☐ Reestablish Single Sign-On (SSO) for Commercial Cards

- Reestablish your **single sign-on (SSO) connection** for your First Western Trust commercial credit card to **manage your card directly** within the new platform.
- All other business credit card users, please continue to use the same website for Elan.
- If your business doesn't yet have a commercial card, now is a great time to explore how it can streamline expenses, improve cash flow visibility, and simplify reporting all within one secure platform. Contact your Private Banker for more information.

☐ Verify ACH and Check Positive Pay

- Ensure **access and settings** have not changed.
  - ACH Positive Pay cutoff: **1:00 PM MST**
  - Check Positive Pay cutoff: **11:30 AM MST**

☐ Re-Enroll in eStatements

- **Re-enroll** your statement delivery preferences.

☐ Link Your Consumer Account

- Utilize the new **Unified Account Summary** feature to connect your business and consumer accounts.

☐ Provide Your Feedback

- We appreciate your participation in our Friends & Family pilot launch, and value your honest feedback.
- Please share your feedback through our [Feedback Survey] or by reaching out directly to your **Private Banker**.