

# Linking Personal & Business Accounts

## MYFW Digital Business Banking Platform Guide

Toggling between accounts enables users to access their business and personal accounts with a single sign-on. This guide is for clients who want to switch between consumer and business accounts on their online banking platform. Clients are required to log into both the consumer and business platforms and create individual logins before they can link their profiles. After linking, clients will use their business login to access the system and can switch between platforms as needed. Please contact your personal banker for additional assistance.

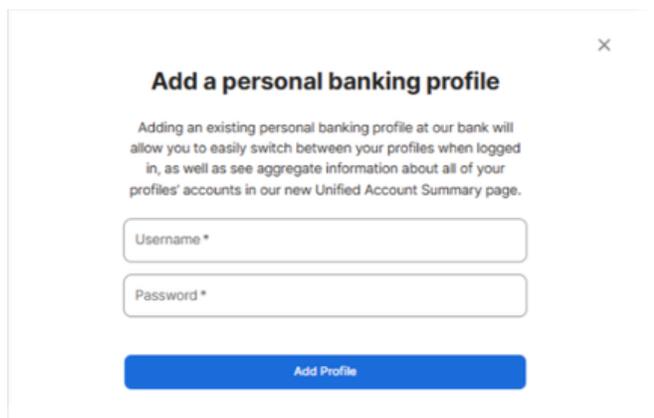
### Linking Profiles

Once you have established access to both the consumer and the business banking platforms, log into the **Business Banking platform**.

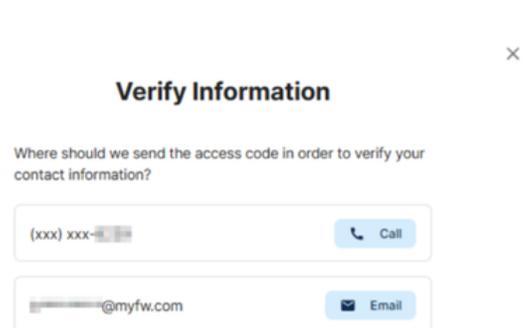
- In the upper right corner, click on the **Link Personal Profile**.



- In the **Add a personal banking profile** box on the right, enter your consumer credentials and verify your identity by phone, text, or email.

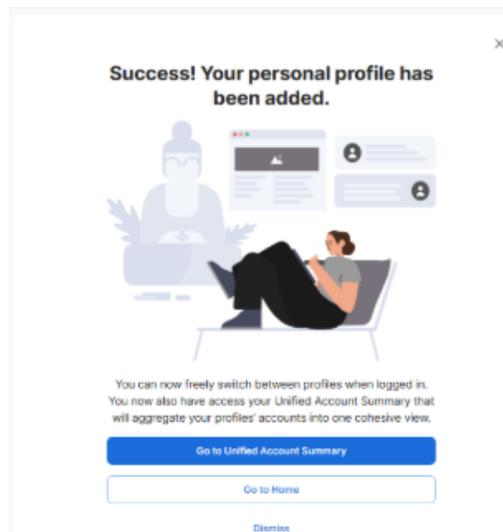


The screenshot shows a form titled 'Add a personal banking profile'. It includes a close button (X) in the top right corner. The text reads: 'Adding an existing personal banking profile at our bank will allow you to easily switch between your profiles when logged in, as well as see aggregate information about all of your profiles' accounts in our new Unified Account Summary page.' There are two input fields: 'Username \*' and 'Password \*'. At the bottom is a blue 'Add Profile' button.



The screenshot shows a form titled 'Verify Information'. It includes a close button (X) in the top right corner. The text asks: 'Where should we send the access code in order to verify your contact information?'. There are two input fields: a phone number field with a 'Call' button and an email field with an '@myfw.com' domain and an 'Email' button.

- You will receive the following message letting you know you have successfully linked your profiles.
- Once verified, click on the **Go to Home** button.
  - See more information below on the **Unified Account Summary** option.
- You can now switch between Personal and Business profiles with a single sign-on.
- **Note:** From now on, you will sign in to your business profile first, then switch to your personal profile as needed.



## Switching from Business to Consumer

To switch from business to the consumer banking platform, click on **Switch to Personal Profile**.



- Click on **Acknowledge & Continue**.
  - To switch back to the business banking platform, click on **Switch to Business Profile** located on the upper righthand side and **Acknowledge & Continue**.

### Switch Profiles?

Hello - you are changing profiles.

**Acknowledge & Continue**

Cancel

## Unified Account Summary

The Unified Account Summary page consolidates your full banking information onto a single page. The page provides a comprehensive overview of available balances across all your accounts and may be set as your default landing page upon login for added convenience.

The screenshot shows the First Western Trust website interface. At the top, there is a navigation bar with the logo and links for Notifications, My Settings, Help, Support, Switch to Business Profile, and Logout. Below this is a secondary navigation bar with links for Accounts, Pay & Transfer, Statements & Documents, Test Single Sign On, and Contact & Support. The main content area features a 'Unified Account Summary' heading with a 'Back to Home' link and a 'Make Landing Page' toggle switch. There are two main sections: 'Personal' and 'Business'. The 'Personal' section shows 'Personal accounts' with a balance of \$36,934.71 and 'Other Accounts' with a plus sign. The 'Business' section shows 'Business accounts' with a balance of \$2,831,873.64 and a 'View All' dropdown menu. A 'Total Deposit Accounts' summary row at the bottom shows a balance of \$36,934.71.

## Questions?

Please reach out to your Private Banker for support.