

Checklist

MYFW Digital Business Banking Platform

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 **between January 9 and January 20**. 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, January 16 - Current platform and mobile app begin transition

6:00 AM MST on Tuesday, January 20 - New Digital Platform is LIVE

Cutoff Times

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

Bill Pay	Thursday, January 15	4:00 PM MST
ACH Same-Day Service	Friday, January 16	11:00 AM MST
Wire Transfers	Friday, January 16	3:00 PM MST
ACH Origination	Friday, January 16	3:30 PM MST
Remote Deposit Capture	Friday, January 16	6:00 PM MST
Mobile Deposit	Friday, January 16	6:00 PM MST
Internal Transfers Between Accounts	Friday, January 16	6:00 PM MST

Before January 16th | Prepare for the New Platform

To ensure a smooth transition and continued access to the information and transfers you rely on, please complete the following:

☐ 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 History

- **Export all account history** for your records.
- **Historical data *will not* transfer to the new platform.** In order to retain your records, [please follow this guide.](#)

☐ Download Bill Pay History

- **Export all 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.](#)

☐ Make Note of Internal Scheduled Recurring Transfers (SRTs)

- **Review** how your **Scheduled Recurring Transfers** are **currently set up** so you can easily **rebuild** them in the new platform.
- **Scheduled Recurring Transfers** will need to be **reestablished** after logging in.

☐ Clean Up ACH and Wire Templates

- **Review and document** how your current templates and account nicknames are set up so you can easily rebuild them in the new platform if needed.
- 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.
- ACH and wire transfers with an effective date **after January 20 will not be processed**, and will need to be reestablished in 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 January 9**.
- Users who do not log in **will not transfer** to the new platform.

☐ Uninstall Remote Deposit Capture Scanner Software

- In the **days leading up** to conversion weekend, **disconnect** the **check scanner** from your computer.
- **Uninstall** the current (old) Remote Deposit Check scanner software **from your computer**.

On January 20th | 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, visit myfw.com to log in to the new digital banking 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 Platform 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 January 16 will not be processed**, and will need to be reestablished in the new platform.

☐ Reestablish Scheduled Recurring Transfers (SRTs)

- [Follow this guide](#) for step-by-step instructions.

☐ 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.
- [Follow this guide](#) for step-by-step instructions.
- All other business credit card users, can 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.

☐ Reestablish Remote Deposit Capture Scanner Software

- **Confirm** the check scanner is disconnected and the previous scanner software has been **uninstalled** from your computer.
- In the new platform, go to **Account Services** and click on **Remote Deposit Capture**.
- **Follow the prompts** on the screen to download the **Remote Deposit Check Scanner software**.
- After installation, **restart** your computer and **plug in** the **check scanner** to make a deposit.

☐ 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.

☐ Bookmark the New Log In Page

- After your initial login and credential set-up, simply access the digital platform by visiting myfw.com and using the login box on the homepage.

☐ Provide Your Feedback

- Please share your feedback through our [Feedback Survey](#) or by reaching out directly to your **Private Banker**.

For more information and resources, please visit our [Digital Banking](#) page or contact your Private Banker.

Questions?

Contact your Private Banker for additional information.

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