

## Attention Internet Teller Users

In order to log into TruMark Financial's new Internet Teller system for the first time you will need to take the following steps:

**Step 1: Access ID:** Use your current User ID (now known as Access ID), but enter it in all **LOWER CASE** letters.

For example: JSmith123 should be entered as jsmith123

**IMPORTANT NOTE:** If you updated your User ID (Access ID) **after Aug. 25, 2011**, or did not set one up, please click the **Enroll Now button** under the Internet Teller log in.



**Step 2: Passcode:** Your temporary Passcode will be the **first five digits of your zip code + the last four digits of the primary account holder's Social Security Number.**

For example: Zip Code of 19053-8496 and Social Security Number of 123-45-6789: the temporary Passcode will be 190536789

**Step 3:** Once you have successfully logged into the new online banking, you will be asked to change your temporary Passcode to a new Passcode. The new Passcode **can be your old Password**, is NOT case sensitive, and should meet the following criteria:

- Minimum of 6 characters
- Maximum of 20 characters
- Minimum of one letter
- Minimum of one number
- Minimum of one special character

For example: trum@rk2011

**Step 4:** You will then be asked to enter your e-mail address and set up three challenge questions.

**Step 5:** If your converted Access ID does not meet the guidelines within our new system, you will be asked to set up a new Access ID.

**Step 6:** Next you will be presented with updated online disclosures, which must be accepted in order to proceed.

**Step 7:** You will now be logged into the new online banking system.

## **Reminder: The following will require your attention after conversion:**

### **Online Bill Payer**

- Even though we continue to utilize Check Free for our Bill Payer service, please make sure all of your billers came over to the new system along with any recurring payments.
- Any billers from which you previously set up to receive an "e-bill" (paperless statements) must be re-enrolled in "e-bill."

### **Scheduled and Recurring Transfers**

- Every attempt was made to bring over your existing scheduled and recurring account transfers; however, we were unable to convert some records. Please review your scheduled and recurring transfers on the new system. You may need to re-establish or adjust them accordingly.
- Processing time for scheduled and recurring transfers also will change from the end of the business day to the early morning of the scheduled date. **Due to this, you may need to adjust your records.**

### **Notifications and Alerts**

- Unfortunately, we are unable to convert existing alerts and notifications. You will have to re-enroll for this service. Within the new Internet Teller system you will have the option to receive e-mail and/or SMS text alerts.

### **Funds Transfer/Cash Edge –**

- You will need to re-enroll for external transfers of funds to different financial institutions. Due to the complexity of the conversion and our decision to bring the processing of external transfers in-house to minimize potential fraud, we were unable to convert your existing setup for external transfers.
- The process for enrolling a new external account has been changed. In order to minimize the potential for fraud, TruMark Financial will now require you to request the account access by completing and sending in a request form along with a copy of your most recent statement from the external account. Once our processors have validated the account and your access to the account, approval will be provided. You can find this form when you register to add an external account. The last page will be the actual form to print and send.

### **FinanceWorks™ powered by Quicken® being replaced with Finance Center powered by Yodlee**

- Coming soon - Finance Center is a free online tool that will allow users to view all of their financial institution transactions in one place. Users will be able to see account and portfolio transactions, credit card activity, and track rewards programs on all credit cards. Remember only one password to access all of your accounts online. Finance Center is free, convenient, and secure.