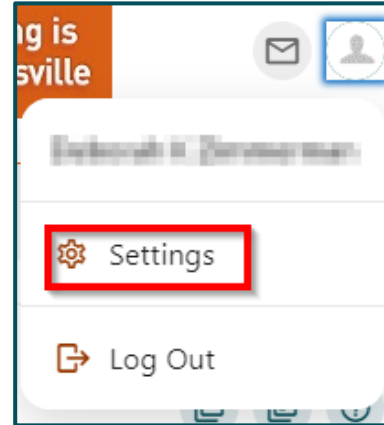


Shared Access

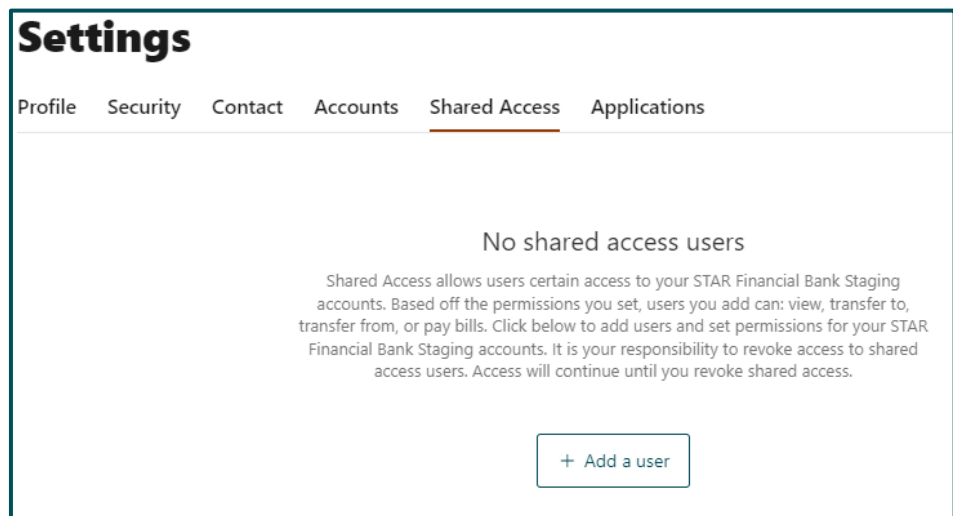
STEP 01/07

To grant access to a new user on your account, begin by clicking your name in the upper right corner and click on "settings."



STEP 02/07

Select the "Shared Access" tab and click "Add User."



STEP 03/07

Enter the new user's name and email address.

Add a new user

First Name	<input type="text" value="Enter first name"/>
Last Name	<input type="text" value="Enter last name"/>
Email Address	<input type="text" value="Enter email address"/>
Confirm Email Address	<input type="text" value="Enter email address"/>

STEP 04/07

Choose the permissions you'd like to grant to the new user and click "Save."

Choose permissions

	All permissions	View account	View Transactions	Transfer into	Transfer from	Pay bills	Access to Statements
Checking - 3 accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-CHECKING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
E-CHECKING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BASIC CHECKING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

STEP 05/07

Review your selected permissions and the "Acknowledge" box. Then click "Confirm."

Confirm and invite user

Bob Lopez - boblopez@gmail.com will be given access to the following accounts:

	View account	View Transactions	Transfer into	Transfer from	Pay bills	Access to Statements
Checking - 3 accounts						
E-CHECKING	●	●	●	●	●	●
E-CHECKING	●	●	●	●	●	●
BASIC CHECKING	●	●	●	●	●	●

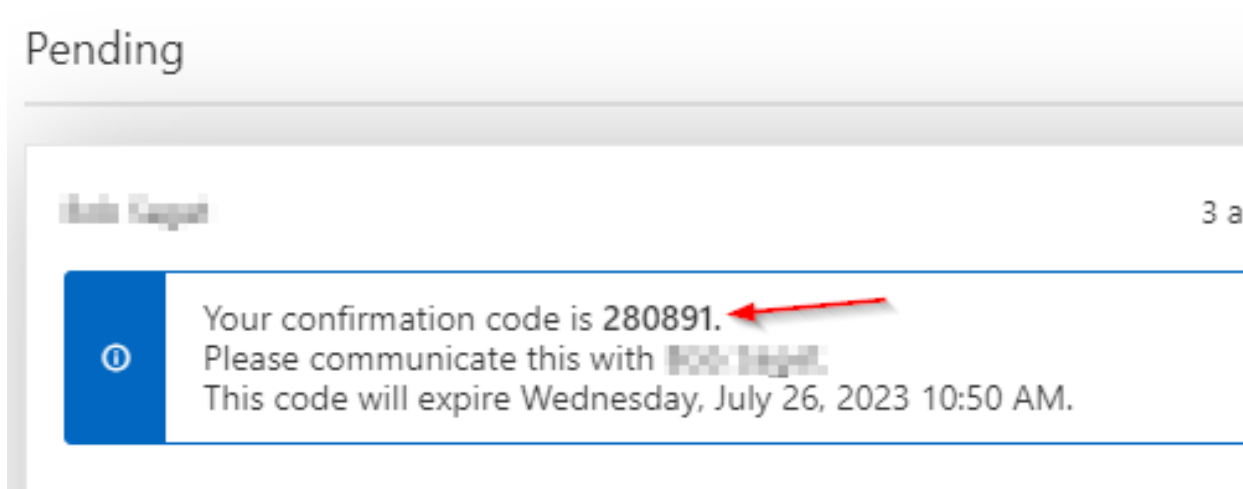
- **Bob Lopez** will be sent an email invitation to access your accounts.
- A confirmation code will be given to you to share with **Bob Lopez**. This code will expire in 24 hours.
- **Bob Lopez** will then be able to access your accounts with their own username and password.

I acknowledge one or more of the settings selected could allow the invitee to transfer money from my account/accounts. I have reviewed settings carefully before allowing shared access.

Confirm

STEP 06/07

The new user will receive an email asking them to set up a username and password. They will be asked for a confirmation code. The owner of the account will have to navigate back to the shared access tab and select their name to view the code.



Share this code with the new user so they can complete their account setup.

STEP 07/07

The owner of the account can remove or modify a user's access at any time by navigating to the "Shared Access" tab.