

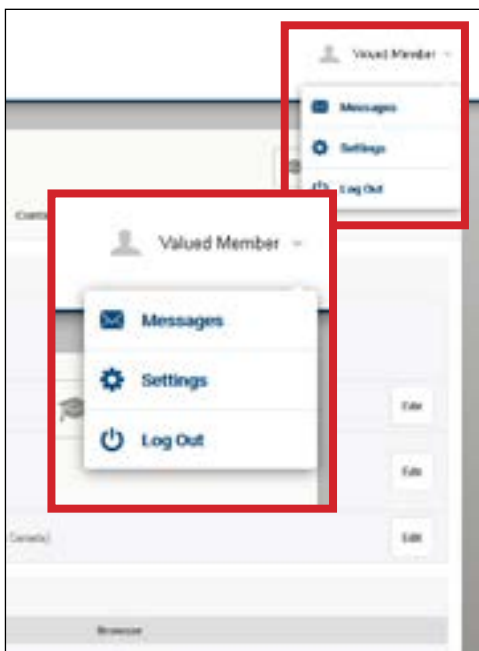
Customization

Settings that can be changed include:

- The Theme (background)
- Notifications (email/SMS)
- Username and Password
- Profile and Contact Information
- Security Questions

To make changes:

1. Hover over your name at the top right corner of any screen (as shown on the right).
2. Click on the “**Settings**” option to navigate to the Settings page.
3. Use the sub-menu options across the top of the page to adjust the settings on the various different features.



LOGIN

Your guide to Jefferson Financial's online banking services



Online banking users can enroll or log in to online banking from our home page.

Mobile Banking

MOBILE APPLICATIONS

Jefferson Financial's free mobile banking application gives you safe and secure mobile access to:

- Manage your accounts
- View your transaction history
- Make transfers
- Pay bills
- Deposit checks
- Find an ATM or branch



TOUCH ID*

Use your fingerprint to login on mobile using Touch ID! If your device is not equipped with a fingerprint reader, set up a PIN for easy account access.

**Feature available with iPhone 5s or later, iPad Air 2, or iPad mini 3 or later. Enabled for Android devices v.4.1 or greater. Online banking is available for members with a Credit Union account in good standing. To use online banking, you will need to either be connected to the internet or subscribe to a data plan through your wireless provider. Consult your wireless plan or provider for additional fees that may apply. iPhone, iPod touch and iPad are registered trademarks of Apple Inc. Android is a trademark of Google Inc.*

Getting Started

FIRST-TIME LOGIN

Upon clicking the “Enroll” button, you will be prompted to accept the online banking disclosure agreement. The next screen will confirm your identity using your Social Security number, email address, birthdate, and account/member number. Follow the prompts to proceeding screens to choose your username, security preferences, and preferred contact information. You can track your registration process in the sidebar on the right side of the screen.

ESTATEMENTS

To enroll in eStatements, go to the “Accounts” widget, click on the account you wish to enroll, then click

“Statements” at the top tab. In the next window, click “Statement Settings” at the right. Click “Enroll” in the pop-up.

DEVICE REGISTRATION

Save devices on which you regularly check your account to save time on future logins.

ACCOUNT HISTORY

The system will display up to two years of account transaction history. This feature will allow you to easily search for transactions by filter options such as date, category, amount, type of transaction, or check.

Transfers

QUICK TRANSFERS

The screenshot shows the 'Transfers' section of the Jefferson Financial online banking interface. It highlights a 4-step process for making a quick transfer:

- STEP 1:** Select the 'From' account (e.g., 0000 PRIMARY SH - 47-4000).
- STEP 2:** Select the 'Amount' (e.g., \$200).
- STEP 3:** Select the 'To' account (e.g., 0000 CHECKING - 47-4000).
- STEP 4:** Click the 'Make Transfer' button.

Use Quick Transfers to transfer funds between your shares/accounts using a simple 4 step process:

1. Choose source account.
2. Choose an amount.
(pre-determined amounts)
3. Choose destination account.
4. Click **“Make Transfer.”**

To change the Date (default is set to “Today”) the transfer will take place, the Frequency and the Reason, click on the options across the top of the screen.

CLASSIC TRANSFERS

The screenshot shows the 'Transfers' section of the Jefferson Financial online banking interface. It displays the 'Transfer Details' and 'Transfer Confirmation' screens. The 'Transfer Details' screen shows the 'From Account', 'To Account', 'Amount', 'Date', 'Frequency', and 'Reason'. The 'Transfer Confirmation' screen shows the same information and a 'Transfer' button.

To transfer funds to shares or loans; to other Jefferson Financial members' accounts; or schedule future or recurring transfers.

1. Choose share/account to transfer funds from.
2. Choose share/account funds will deposit to.
3. Enter the exact amount you would like to transfer.
4. The date is set to the Current Date, but you can schedule a Future Transfer.
5. Choose the Frequency of your transfer. The **default** setting is **“One Time”**.
6. Review the **“Transfer Confirmation”** box
7. Click **“Confirm Transfer”** to process the transfer.

SCHEDULED TRANSFERS

The screenshot shows the 'Scheduled Transfers' section of the Jefferson Financial online banking interface. It displays a calendar view with colored dots indicating scheduled transfer dates. Below the calendar is a list of scheduled transfers, including the date, amount, and frequency.

Calendar

The colored dots denote days on which at least one transfer will be executed. Selecting one of the colored dates will automatically highlight the scheduled transfer entries at the bottom of the screen. Conversely, selecting a scheduled transfer entry will highlight the affected dates on the calendars.

Scheduled Transfers List

Below the calendar is a list of scheduled transfers.

Each entry displays:

- Month and date on which the transfer is scheduled to occur.
- Account funds will be taken from.
- Account where funds will be transferred.
- Frequency (e.g. monthly) to the right of the transfer amount.
- Details (starts-on date, number of transfers, ending date, etc.).
- Transfer Reason

Select **“Edit Series”** to change or cancel the schedule for the associated transfer.

Member to Member and External Account Transfers

To transfer to another Jefferson Financial member or to add an External Account that has not been linked to your online banking, click “Add Account” and select “at Jefferson Financial Credit Union” or “at another bank.” *Note: This must be set up on a PC before using on a mobile device.*