IMPORTANT ACCOUNT INFORMATION

Trinity Online Banking Upgrade
May 7, 2024

April 16, 2024

On **May 7, 2024**, Trinity Bank will be launching an enhanced online banking service. We want you to be aware of several changes as we migrate to the new program. Please review the following information to insure you are able to access Trinity Online on and after May 7th. Contact us at 817-569-7272 if you need assistance. To learn more about the features of the enhanced online system, visit our website at www.TrinityBk.com. Click on the "New Online Banking" banner.

Bill Pay Important Dates

Starting Friday May 3rd at 3:00pm, Bill Pay will be unavailable until it is reactivated on Tuesday May 7th at 8:00am. All current scheduled payments will be paid on their scheduled payment dates.

Limited availability may affect the processing of your payments:

- May 3rd prior to 3:00pm will be the last day you can add a payment in the current system.
- All current accounts and payees will be moved to the enhanced service.
- New payments can be added starting on May 7th at 8:00am.
- All recurring bill pays will be moved to the new service.

Enhancements beginning May 7, 2024

Desktop Users

Browsers supported are: The latest 2 versions of Google Chrome, Firefox, Microsoft Edge, Safari.

First Time Login:
To access your accounts on our new Online Banking service on or after the May 7th, you will follow the initial login process:

- Go to www.TrinityBk.com
- On the top right side of our homepage, you will see the Online Banking button.
- This link will take you to the Login page.
- Username – Type in your current username (this did not change).
- Password – Type in your current password.
- The next screen will say "Trinity Bank requires you to create a new password before you log in.
- Select "Create a new Password". Popup explains the new password requirements. Select "Agree" and "Continue"

- What is the User trying to do? – Is the user resetting their Individual password or the password for a Business Master User OR Is the user resetting their password as a Business Sub-user. Select your choice.
- The system will ask you several authentication questions. The answers must match what we currently show in the system for your Username. Continue
- The system will ask you how you want to receive a verification code. Select your method.
- Type in the code you receive.
- After you have been verified, you will be asked to set your new password.

Changing your password:

- Once you have received and entered the code you will be prompted to set your password.
- Type in your password that must be at least **12** characters in length. It must contain:
    - At least one lower case letter,
    - At least one upper case letter,
    - At least one number,
    - At least one special character.
- Retype your password. Continue
- Read and accept the Online Banking User Agreement. Continue
- Enter your email address, cell phone number, and time zone. Continue
- Read and accept the Terms and Conditions Agreement. Continue
- Once completed, you will have access to our enhanced online banking system.

Navigating the New System:

In the enhances online banking system, you will see the following tabs located across the top of the page:

Dashboard – Landing page. Accounts listed with balance. Past and future transactions. Add and view Linked External Accounts with balances.

Accounts- View your Trinity Bank account transaction history and account details such as account type, interest rate and maturity date. CHECK SERVICES lets you Stop Payment on a check or order new checks. ELECTRONIC DOCUMENTS tab is where you will locate your bank account statements. Coming soon, we will have CD Notices, Loan Notices and Tax Forms.

Transfer & Pay – TRANSFER Use this tab to transfer money between your Trinity Bank accounts and set up or transfer from your accounts at other financial institutions. BILL PAY allows you to set up payees, electronic bills and make payments.

Financial Planning (Retail Only) – Set up spending goals and categories for budgeting. Create savings goals and check your financial health.

Tools – SETTINGS Create Nicknames for accounts. Customize your security settings. Update your contact information and mailing address. Shared Access allows you to give access to your account information to another user. ClickSWITCH can be used to easily change automatic debits or deposits from other financial institutions to Trinity Bank. LOCATIONS will give you the physical location of Trinity Bank. FIND MONEY PASS Find our free network of ATM locations.

Communication – MESSAGE CENTER gives you access to send and receive secure messages to and from Trinity Bank. ALERTS lets you set up various Alerts to notify you of selected situations such as low balance or loan payment due.

Mobile Users

Mobile banking customers will need to delete the existing application before loading the new one. **Beginning May 7th, the new mobile app will be available to download.** Look for the new Trinity Bank icon in the app store for Apple and Android phones.

As a new feature, we now support a completely mobile experience for our customers. All features are now available on your mobile app including password resets. Type in your current username and password, and then follow the prompts. You will also be asked to set a new password if you have not already done so on a desktop.

Upon your first login to the new mobile application or any new device, you will be required to authenticate. You can utilize the "Remember Me" feature to avoid this step in the future. You have the option to receive the authentication code via text, email, or a phone call. This contact information must match what we have on file. If the options presented are not valid, please contact Trinity Bank at 817-569-7272 for assistance.

Navigation
The most used selections are displayed in a menu at the bottom of the page.
When "…more" on the bottom right-hand corner is selected, a full menu is displayed. This menu allows for the same functionality as described above. We are very excited to have a mobile application that has the features and functionality of our desktop service.

Business Users

Basic Business Users
Business customers that have limited services which include only bill payments or multiple user access to business accounts are considered our Basic Business Users.

- These users will login using the process above.
- Navigation remains the same as above except the Financial Planning tab for retail will be replaced with Business Services for business users.
- If you have multiple users:
    - The administrator will be able to work with them by selecting the "Business Services" tab at the top of the page.
    - Then click "Business Admin". All users were brought over from the prior system.
    - Here you can modify, set up and delete user access to your accounts.

- If you have multiple companies, you will only see your personal accounts or one company on the Dashboard landing page.
- To access additional company accounts that have been linked to you:
    - Click on the Profile Icon in the top right corner of the page.
    - A dropdown list of the additional linked companies will display.
    - Select the company you wish to view and the associated accounts will now display.
    - On your first access you will add a password for each company (you may use the same password for all companies).
    - Future access will not require the password unless you are using a mobile device.

Please contact us if any companies are missing or if you have additional questions. Utilize the Message Center within Trinity Online or call 817-569-7272 or email us at CustomerService@TrinityBk.com.

Treasury Services Users
Business customers that have ACH Origination, Remote Deposit Capture, Wire Transfer, or Positive Pay will have a Business Services tab at the top of the page instead of the Financial Planning tab. This tab will give you access to any of the services you have authority to use - Business Admin, Remote Deposit, Wire Transfer, Positive Pay and Reports.

Beginning April 19, 2024 after 4:00pm – Any changes made to wire templates or ACH file templates or payees will need to be noted and re-entered when the Trinity Bank representative visits with you to transfer to the new online banking system. **Data changes after 4:00 on April 19th will not be converted automatically onto the new system.** The Treasury Services staff will assist you with this data entry on the new system.

Your Dashboard landing page will be your personal accounts or one company. If you have multiple companies, click on the User Icon in the top right corner of the page. A list will drop down of the additional linked companies. Select the business you wish to work with and those accounts will now display.

Prior to May 7th, the Treasury Services department will be in contact with you to go over these changes and assist with any processes that will be different on the new service.

Quicken or QuickBooks Users that upload/download transactions will have a few changes in Quicken/QuickBooks to continue loading transaction information. Please visit www.TrinityBk.com and click on the "New Online Banking" banner. Conversion instructions will be found here. The documentation provides step by step instruction on what you will need to do by **May 1st** (1st action date) and after the upgrade date on **May 7th** (2nd action date).

Online Banking Enhancements

New Look
We have a new look and a more modern feel when using Trinity Online.

Mobile Functionality
Trinity Online will now have the same functionality on the desktop and mobile application. For example, the mobile application will now allow you to add an external account and transfer to and from that external account or reset your password, just as you have been able to do on the desktop.

Trinity Bank Assistance
Trinity Bank has multiple ways to communicate and answer questions within the online banking solution. You will have the option to Chat, send us a secure message through the Message Center, and interactive screen assist when needed with guidance and questions. Additionally, on a mobile device, the customer can activate Digital ID which will allow Trinity Bank to identify the end user quickly and accurately.

We will add customer support hours following the upgrade to assist with questions. The new "Chat" function within Trinity Online will be monitored on the following schedule:

Monday May 6th to Friday May 10th from 8:00am to 8:00pm
Saturday May 11th from 9:00am to 3:00pm
Monday May 13 to Friday May 17th from 8:00am to 8:00pm
Going forward Monday thru Friday 8:00am to 5:00pm

We can be reached by phone at 817-569-7272 or email at CustomerService@TrinityBk.com during business hours 8:30am to 5:00pm

Added Security Options
We have added dual authentication in more areas. The user can require two-factor authentication for every login if desired. Trinity has also added enhanced layered security to our offering.

Added Alerts
You now have alerts/notifications on more topics – General, Account, Authentication, Mobile Deposit and Transfers.

Personalization and Customization
The enhanced system will automatically put many of your transactions into categories. Easily modify the defaults to make the system work for you to track expenses and help with budgeting. You can color code accounts, move accounts up or down in order on the display, hide accounts that you don't want to see and set a profile picture.

Link External Accounts
Link external accounts to view balances and transactions from other institutions and online accounts by linking them to your Trinity Dashboard. Add your mortgage, investment, and retirement accounts and see them all at a glance. Just click "Get Started" and follow the prompts.

Financial Planning (Personal Accounts Only)
Monitor spending and categorize transactions for budgeting as well as create savings goals. Visit this area to measure your financial health.

External Transfers
Trinity Online will now have the option of instantly adding an external account by using your login credentials from your account at an external financial institution. Existing external transfer accounts will come over to the enhanced online service.

Trinity Customer Transfers
With just the name and account number you will be able to transfer funds to another Trinity Bank customer. It only takes a few minutes to set up. Notice will be given to the recipient when this access is enabled and when funds are transferred. As before, you can still instantly transfer between your own accounts here at Trinity Bank.

Shared Access
Users will have the ability to set up access to their online accounts with a non-owner, such as a child or a parent. You are in control of this access. You grant it and you can take it away with just a few clicks. All you need is their full name and an email address for them. Find this option by clicking Tools > Settings > Shared Access.

ClickSWITCH (Personal Accounts Only)
This tool will automate the process of switching debits and deposits from other institutions over to your Trinity Bank account. Go to Tools and select ClickSWITCH to use this feature.

Password Change & Reset
Online Banking Users will have the ability to securely change your Password from the mobile app as well as a desktop. This feature will also allow you to reset your password if you happen to forget it.

If you have any questions or concerns about the enhanced online banking system, please call Trinity Bank at 817-569-7272 or email CustomerService@TrinityBk.com . We are here to help.