



Dear Valued Client,

As Southwest Heritage Bank (SWHB) continues to grow, we are committed to offering you, our valued clients, the best products and services. We take pride in providing our customers with the highest level of service. **Please read this letter carefully.** We have created a timeline of the upcoming changes along with **Steps You Need to Take** to help ensure you have a seamless transition.

The Bank 34 Consumer Online Banking (OLB) will begin its conversion to SWHB Online Banking Friday, May 17<sup>th</sup>, 2024, at 2 p.m. CT and will be complete on Monday, May 20<sup>th</sup>, 2024, at 10 a.m. CT.

**Today through Friday, May 17, 2024, at 2 p.m. CT**

Login to your current online banking (OLB) dashboard

- Verify the phone numbers and email addresses in your profile are current and correct.
  - The last day to make any changes to your online accounts and profile will be Friday May 17<sup>th</sup> at 2 p.m. CT.

**Save/Print** ALL your current Internal/External transfer information. This will allow you to review for accuracy and re-establish if necessary.

- Scheduled/Reoccurring Internal account transfers **will convert** to the new online banking platform.
- Scheduled/Reoccurring External account transfers **will not convert** to the new online banking platform and will need to be re-established on the new SWHB platform.
  - Pending transfers scheduled for Friday May 17<sup>th</sup> **will process** that day within the current platform. You will not be able to make any changes to these transfers after May 16<sup>th</sup> at 9 a.m. CT.
  - Transfers currently scheduled to occur after Friday May 17<sup>th</sup> **will not be processed.**
- Sub User Access and permissions. Sub Users will not convert to the new online banking platform and will need to be re-established on the new platform.

**Bill Pay**

All payees and scheduled payments entered before Thursday May 16<sup>th</sup> at 8 a.m. CT will continue to be processed and all information will be converted into the new SWHB Bill Pay platform. However, you will not be able to view Bill Pay activity via Bank 34 platform after Thursday May 16<sup>th</sup> at 8 a.m. CT.

**Intuit (Quicken/QuickBooks)**

We recommend that you perform a final download of your Intuit product before Friday May 17<sup>th</sup> at 2 p.m. CT.

**Monday, May 20<sup>th</sup>, 2024, at 10:00 a.m. CT**

On Monday May 20<sup>th</sup> at 10:00 a.m. CT, the new SWHB OLB platform will be ready to access and the previous version for Bank 34 will no longer be available.

Please use the following link to access the new SWHB OLB: <https://www.olb-ebanking.com/122106251/login/> or visit our website at <https://SWHBank.com> to begin your setup.





### **Consumer Online Banking (OLB)**

For the initial login, users will need their existing user ID and a temporary password. The temporary password will be the last four digits of your SSN or Tax ID, followed by your zip code. You will then be prompted and are required to change your password.

Requirements for the new password are as follows:

- Minimum Password Length = 10
- Numeric Characters Required = 1
- Special Characters Required = 1
- Uppercase Characters Required = 1
- Lowercase Characters Required = 1
- Alpha Characters Required = 2

### **eStatement Services**

The Primary Tax ID owner must re-enroll their accounts for eStatement services. To accept, read the Terms and Conditions, and enter the code provided at the bottom of the document. Once re-enrolled, all other signers can then access the statements online.

### **Bill Pay**

Monday May 20<sup>th</sup>, at 10 a.m. CT, all converted Payees and Scheduled payments will be viewable on the new SWHB OLB platform.

### **Mobile Banking**

After 10 a.m. CT on Monday May 20<sup>th</sup> after completing the initial login process for OLB, you can now download the new SWHB mobile banking app in your Apple App Store or Google Play Store. You will login using your newly created credentials and follow the prompts, accepting the Terms and Conditions for the mobile app. Once you have logged into the new SWHB app successfully, you may delete your Bank 34 mobile banking app.

**Note: You must login the 1<sup>st</sup> time via Online Banking <https://www.olb-ebanking.com/122106251/login/> before attempting to re-enroll into the new SWHB app. See details above under Consumer Online Banking (OLB).**

### **Zelle**

After 10 a.m. CT on Monday May 20<sup>th</sup>, after completing the initial login process for OLB you will be required to re-enroll for Zelle.

### **Intuit – Quicken/QuickBooks**

Log in to your Quicken/QuickBooks account and disconnect Bank 34 accounts and reconnect to the new Southwest Heritage Bank on or after Monday May 20<sup>th</sup> 10 a.m. CT. See below for correct connection to choose.

#### **Personal Online Banking**

QuickBooks Online and Quicken Express Web Connect: Southwest Heritage Bank **Pers**

QuickBooks and Quicken Direct Connect: Southwest Heritage Bank DC

The User ID and Password for the Intuit connection will match your Southwest Heritage Bank online login credentials.





### **Small Business Owners (Users) and Sub Users**

Business Users that are not utilizing SWHB Business Online Treasury Services but share online access with non-account signers will be set up as a Small Business Online profile and all Sub Users will need to be re-established within the Consumer OLB platform On or after Monday May 20<sup>th</sup> 10 a.m. CT.

Go to the **Administration tab / Company Administration / Manage Users**. Click **Create New User** link. Enter in the required address information for the user, then click **Next**. Type in the required user phone number, click **Next**, create a user ID and temporary password for the user, then click **Next**. Then set User Access and Transaction Security, then click **Create User**. You will be able to set up account access for the user. Click the 3-dot ellipsis and select **Access** for each account to set the users permissions within each account.

### **The following Services and features will remain unchanged:**

- Limits for Bill Pay, remote deposit, mobile deposit and Zelle will remain the same.
  - Administrators will need to add user level limits.
- Bill Payment Payee Information and Scheduled Payments
- Account Access, Account Nicknames, and Service Availability
  - Account Nicknames specific to each user will not convert.
- Deposit Account Transaction History

**Note:** 90 days of deposit transaction history along with the remaining 10 months of deposit history, Loan and CD account reporting will be available for OLB viewing by Tuesday May 21<sup>st</sup>. Deposit Images processed before Monday May 20<sup>th</sup> will not be viewable online

Thank you for choosing Southwest Heritage Bank, formerly known as Bank 34, for your banking needs. If you would like help or have any questions regarding this communication, please visit your local branch or contact Customer Service.

Contact Us

[CustomerService@Bank34.com](mailto:CustomerService@Bank34.com)

