

## Understanding Migration Blackout Windows

### Your Internal Transfers

**Migration will start at 5pm ET on Tuesday, November 5<sup>th</sup>.** Any actions taken in Online Banking after this time will **not** migrate to the new platform. This includes the scheduling of any internal transfers to be processed after 11/12.

You will be able to modify this information again starting on 11/13 in the new platform.

Any scheduled transfers or payments set to process between 11/6 and 11/12 will process as normal through the current Online Banking platform.

### Your User Data

**Migration will start at 5pm ET on Tuesday, November 5<sup>th</sup>.** Any actions taken in Online Banking after this time will **not** migrate to the new platform. This includes updating of user contact information or Access Ids. Please make sure your information is up to date prior to this cutoff time.

You will be able to modify this information again starting on 11/13 in the new platform.

### Bill Pay

**Migration will start at 6pm ET on Friday, November 8<sup>th</sup>.** At this time the Bill Pay service will become unavailable until Wednesday, November 13<sup>th</sup> at 8am. All scheduled payments to be delivered between 11/12 and 11/15 will process as expected, however you may not be able to modify them.

We recommend that you alter the delivery date to before 11/8 or after 11/18 to avoid any issues with cancelling a payment.

# Information Migration Guide for Private Clients

Digital Banking Platform Conversion - 2019

**BOSTON PRIVATE**

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## Migration Information by Feature

<b>Type of Information</b> <i>Lists the specific information that appears in the current and future platform.</i>	<b>Migration Information</b> <i>An explanation of how the information in the Type of Information column will be migrated and appear in the new Digital Banking platform.</i>	<b>Action</b>
Accounts and Account Access	<p>All of the active accounts you use today in Online Banking will automatically carry over into the new Digital Banking platform. If you have permanently closed accounts, they will not migrate.</p> <p>Additionally, if there are other accounts that you have access to at Boston Private, those accounts will automatically be linked and added to Digital Banking.</p> <p>Account Nicknames you've defined in the current platform will appear in the new platform.</p>	No Action Required
Account Transaction History	<p>Your transaction history for the last six months will be migrated, however all transactions prior to that will not. If this is important history for you, we recommend that you download transactions from each of your accounts prior to conversion.</p> <p>Your existing categorizations of past transactions will not migrate, but will be available as a feature within the <a href="#">Personal Financial Management (PFM) feature</a>.</p> <p>If you need transaction history from closed accounts, you will need to download it from Online Banking in advance of the conversion.</p>	Optional Action
Internal Transfers	<p>All of your future-dated and recurring internal transfers (referred to as "<a href="#">Between Accounts</a>") will be automatically migrated, with the exception of Loan Payments (see below).</p>	No Action Required
Loan Payments	<p>If you have set up future or recurring Loan Payments using the Transfers feature, the future payments or recurring series will be cancelled and not migrate for you. You will need to set up the payment using a new Loan Payment process that is more user friendly.</p> <p>Note: if you have set up Loan Payments via Bill Pay, these will not be cancelled.</p>	Action Required

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Loan Advances	If you have a HELOC or Credit Reserve account that supports Loan Advances and you have future dated or recurring advances scheduled using the Transfers feature, these advances will be migrated for you.	No Action Required
External Accounts & Transfers	Your linked external accounts will not be migrated to the new Digital Banking platform for security reasons. You will need to re-link these accounts. The new External Transfers feature offers immediate verification of external account ownership for most institutions and minimal use of micro transactions. <a href="#">Learn more here.</a>  As a result, any recurring or scheduled external transfers will NOT be migrated.  Note that all users will have access to a choice of 1-day or 3-day processing.	Not Migrated
Mobile Deposit History	History specifically for mobile deposits will not be migrated, but all of your deposits will appear as past transactions and include check images.	No Action Required
Bill Pay Billers	Your Bill Pay Billers will be migrated.	No Action Required
Bill Pay Payments	Your Bill Pay Payments will be migrated and process as expected.	No Action Required
Bill Pay eBills	Your eBills will be migrated.	No Action Required
Alerts	All of the Alerts that you've set up will migrate with a few exceptions:  <ul style="list-style-type: none"> <li>- Balance Alerts on set Intervals – alerts that were set up to notify you of your current balance on a fixed interval (daily, weekly, etc) will be removed.</li> <li>- Transaction Above Amount – mandatory alerts for transactions above certain balances have been removed and there is no longer a requirement to receive this alert.</li> </ul> We recommend that you review your alerts the first time you log in to the new Digital Banking platform. <a href="#">Learn more about Alerts in Digital Banking.</a>	Optional Action
Stop Payment Requests	Any existing Stop Payment requests made up until conversion will be processed as normal. You will not see a record of the request in Digital Banking after conversion, so we recommend that you make note of the Stop Payment information and check with your local banking office if you have questions.	No Action Required

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eStatement Preferences	eStatement preferences will not migrate, so your eStatement preferences may indicate that none of your accounts are opted-in for eStatements even if you have indicated this in the past. However, your existing eStatement preferences will be honored, so you do not need to opt-in for eStatements again.	No Action Required
PopMoney (P2Pr Transfers)	The P2P features is unavailable in the new Digital Banking platform, so any contacts that you have linked for payments will not be migrated. We recommend that you make note of any scheduled or recurring payments and work with your local banking office or Relationship Manager for alternative payment options.	Not Migrated
Secure Message History	Your personal secure message history will not be migrated.	Not Migrated