Conversion Checklist

Business Edition Users

BOSTON PRIVATE
WEALTH ▫ TRUST ▫ PRIVATE BANKING

This checklist is provided as a convenience to you as a client that will be using the Business Edition of the new Digital Banking platform. Your current setup(s) within the current Online Banking platform will be migrated to the new Digital Banking platform and this checklist provides you with steps you can take to make the conversion as smooth as possible for you and your organization's users.

Note: Please work with your organization's administrator to complete this checklist.

Pre-Conversion

- ☐ Review the Corporate and Business Migration Reference to understand how your data will appear in the new system
- ☐ Check all of your contact details for accuracy
  - You should have an SMS-enabled mobile phone number listed on your profile. This number will be used in the new platform to authenticate them on first-time login with a one-time-use code.

Day Before

- ☐ Review the First-Time Login Guide so you know how to log in on conversion day

Conversion Day

- ☐ Make sure you can log in as expected
- ☐ If you have access to Cash Management applications, check to make sure you can access them through the menu:
  - Bill Pay
  - Positive Pay
  - Remote Deposit Capture
  - Lockbox

If you need help or are unable to access something, please check with your organization's administrator or call the Concierge Desk at (888) 322-2120.