

Conversion Checklist

Private Clients

BOSTON PRIVATE

WEALTH ▫ TRUST ▫ PRIVATE BANKING

This checklist is provided as a convenience to you as a user of the Private Client Edition of the new Digital Banking platform. Your current setup within the 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.

Pre-Conversion

- Review the [Information Migration Guide for Private Clients](#) to understand how your data will or will not migrate to Digital Banking.
- Check that all of your contact details are accurate
 - You should have an SMS-enabled mobile phone number listed on your current profile. This number will be used in the new platform to authenticate you on first-time login with a one-time-use code.
- Review and make note of all External Accounts and scheduled transactions from those accounts you have set up.
 - You will need to re-link all of your external accounts at other institutions and set up any recurring transactions again. [Learn more here.](#)
- Review all of your PopMoney payees and planned future payments. This service will no longer be available and alternate payment methods will need to be used.
- Check that you don't have any Bill Pay Payments scheduled during the payment blackout window between 11/7 – 11/12. If you do, adjust your next payment to pay on 11/6 or before, or after 11/13.

Day Before

- Make note of your scheduled and recurring transfers so that you can verify that those same transfers are scheduled post-conversion.
- Check out the First Time Login guide to make sure you know how to log in

On/After Conversion Day

- Go through the First Time Login process
- Check that all of the accounts you expect to see are available
- Review all of your scheduled payments
- Review all of your recurring payments
- Review your Alerts to make sure that you're alerted to the activities you prefer.
- Review your Secure Access Code delivery points to make sure that any email addresses or mobile phone numbers you prefer are included
- If you have recurring or future-dated Internal Transfers to Loan Accounts to make loan payments, you will need to set up the loan payments again using the Loan Payment menu.
- Connect your [External Accounts](#) for inter-institution transfers (now with 1-Day service available)
- If you have external services (like Mint, QuickBooks, Quicken, etc) connected to Online Banking, you will need to re-authenticate those applications or services. There may be a delay of up to two weeks for this process.