



TRUSTAR BANK

MOBILE BANKING TUTORIAL



TRUSTAR MOBILE BANKING

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YOUR TRUSTAR APP CAN DO SO MUCH MORE!

Tired of logging into multiple applications in order to see your account balances?

With your Trustar mobile banking app, you can:

- ✦ Consolidate all of your bank accounts and credit cards into one convenient location
- ✦ A variety of banks and account types can be linked to your Trustar Bank profile
- ✦ Create spending and savings goals that will be automatically tracked based on the bank accounts you granted consolidated access to

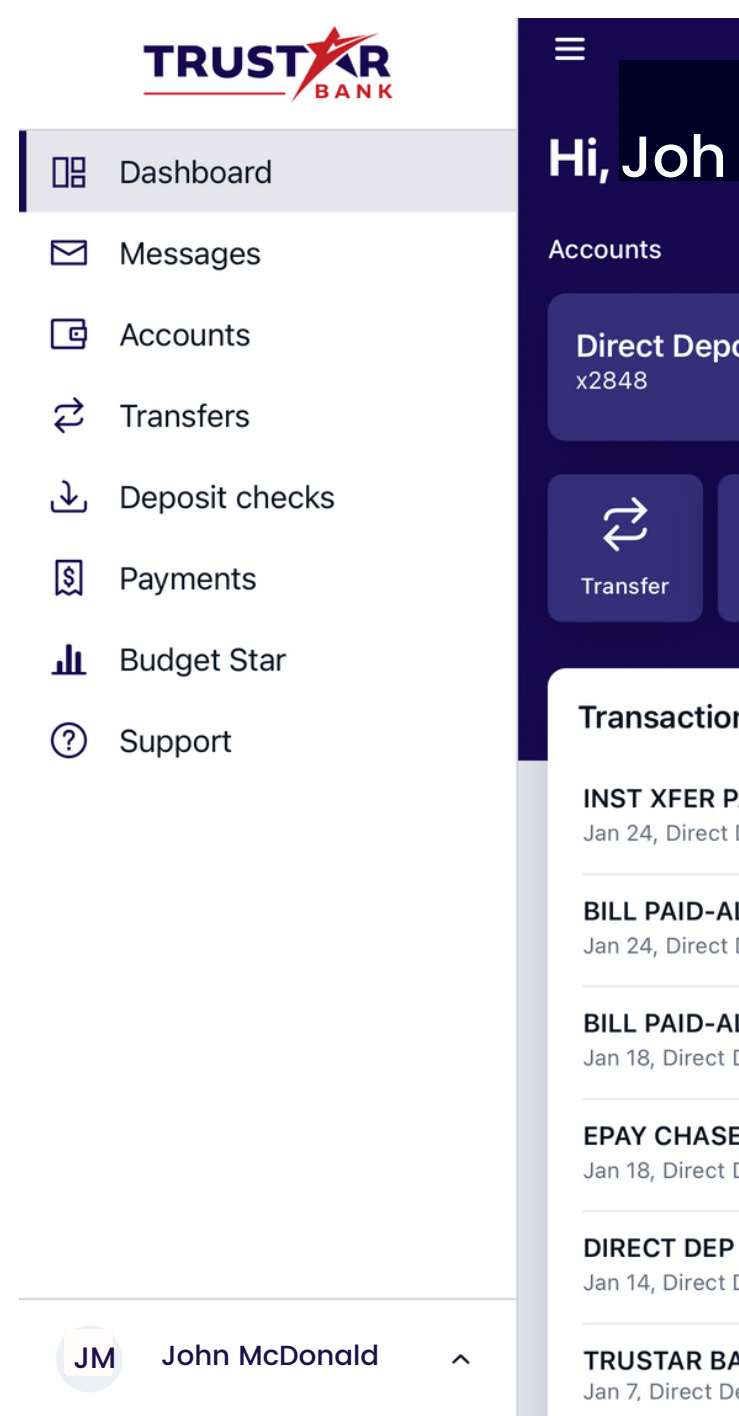
The Type of accounts can include the following:

- 401A
- 401K
- 403B
- 529
- Annuity
- Auto Loan
- Line of Credit
- Loan
- Mortgage
- Brokerage Product
- CD
- Checking & Saving
- Credit Card
- Traditional/Roth IRA
- Keogh
- Money Market
- Student Loan
- Variable Annuity

CONSOLIDATING YOUR BANKS

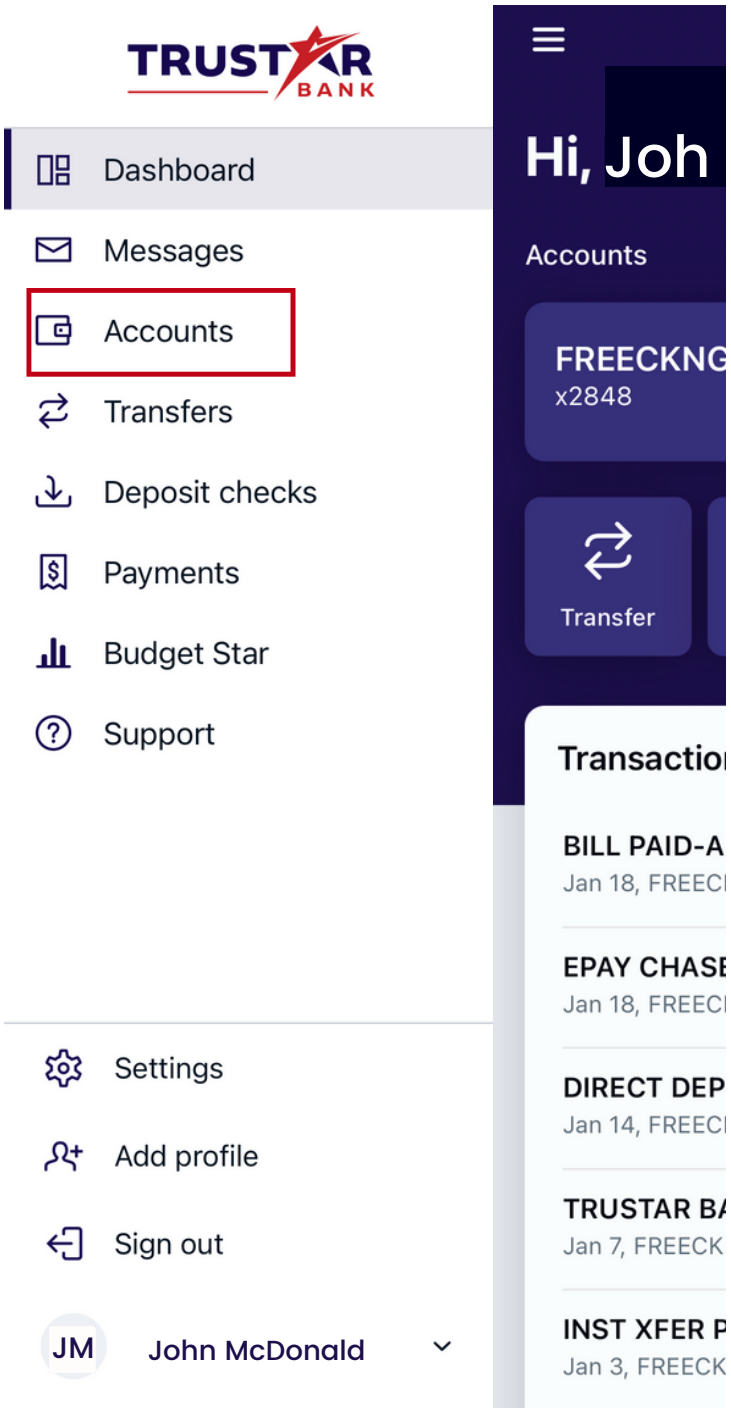
Step 1

⚡ On the home page, click the icon on the top left of your screen to open the side menu.



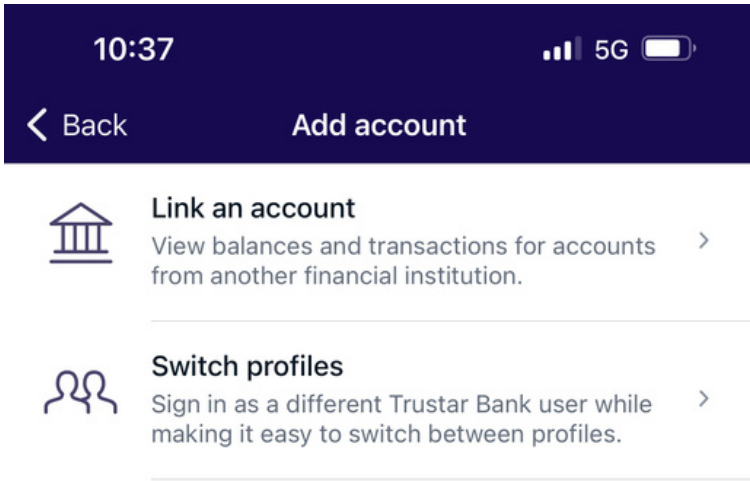
Step 2

⚡ Select “Accounts” Click the (+) in the upper right hand corner.




CONSOLIDATING BANKS

Continued

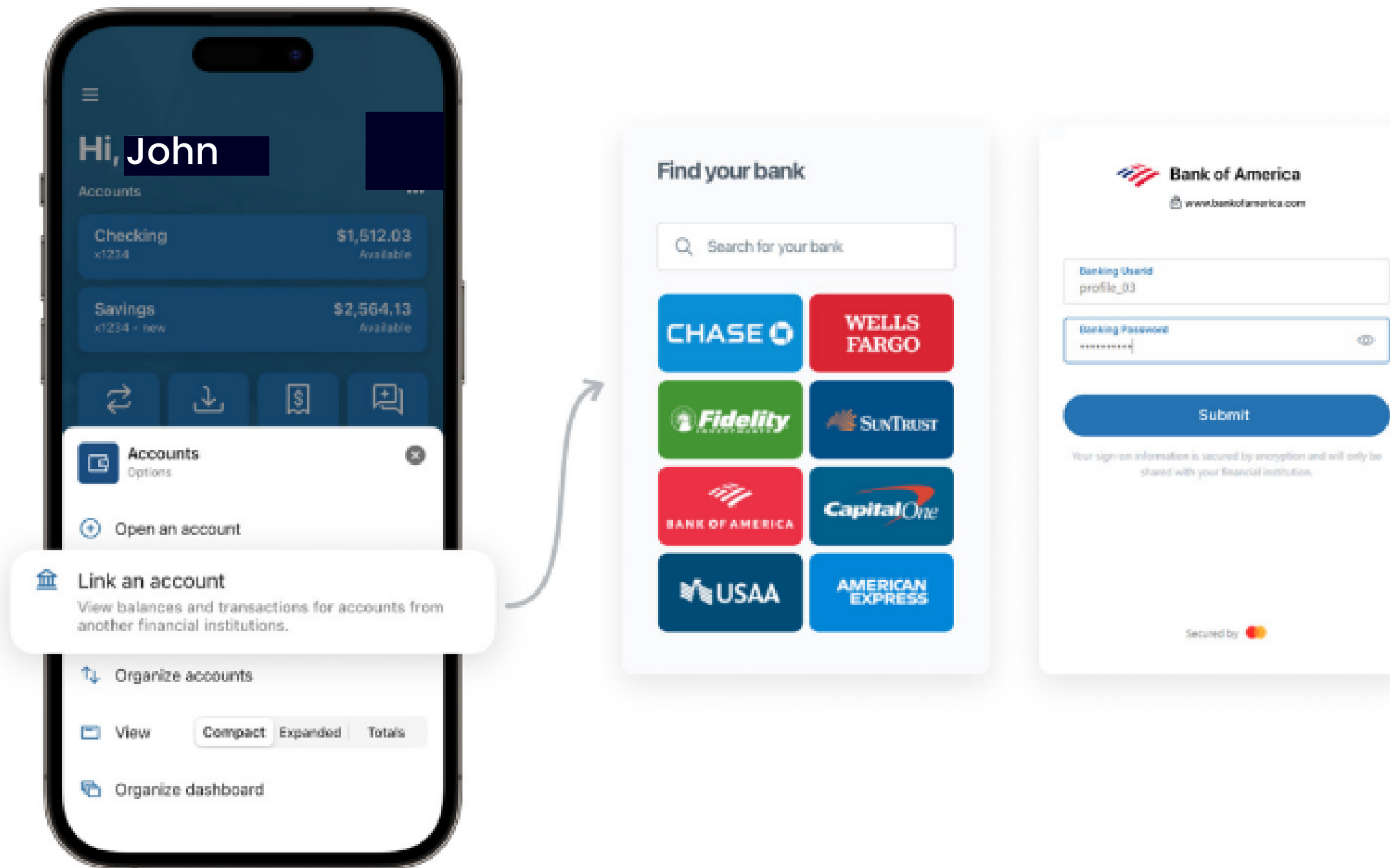


Step 3

 Then, select
“Link an Account”

CONSOLIDATING BANKS

Conveniently view all of your bank accounts on one app!



★ By linking accounts, you can view account balances, review transactions, and better manage your finances – all from your convenient Trustar Bank app.

CONSOLIDATING BANKS

Hi, John

JM

Accounts

...

Savings 0002
x2386

\$8,307.68
Available

Greens 0001
x2828

-\$681.57
Available

Bonvoy Amex Card
American Express Credit Card

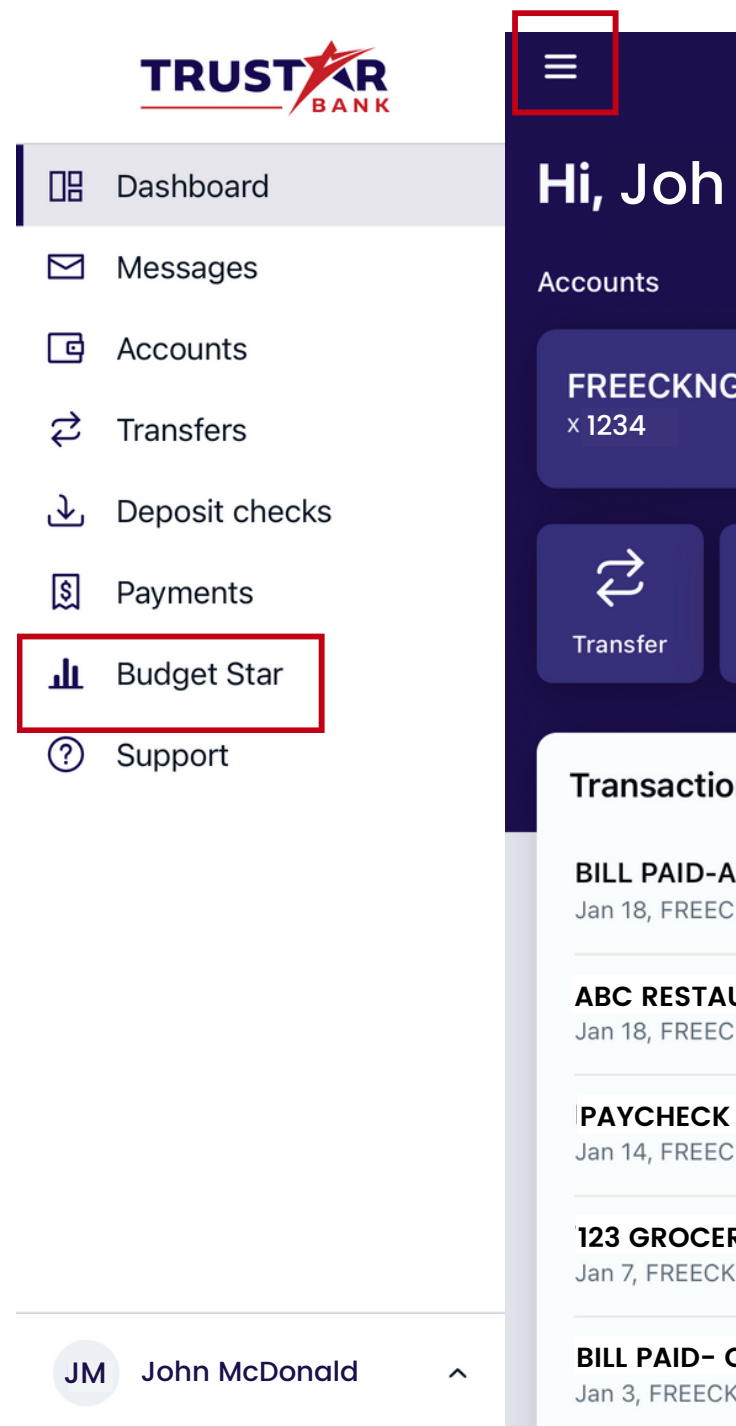
\$1,691.58
2 days ago

*Add an account

★ Once accounts are linked, they display in alphabetical order at the top of your dashboard, following your Trustar Bank accounts.

USING BUDGET STAR

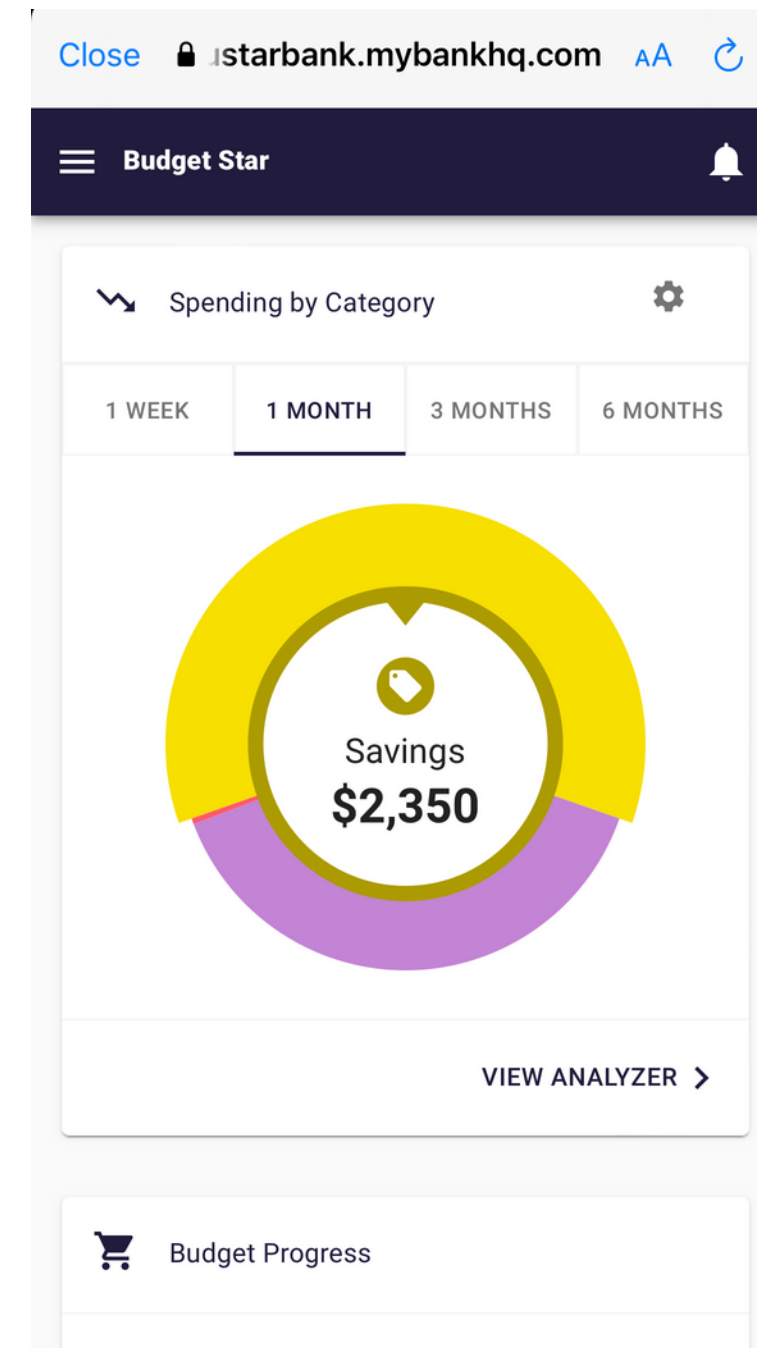
Budget Star is Trustar Bank's budgeting tool that allows you to track your spending, save towards a goal, and more.



Step 1

✦ On the home page, click the icon on the top left of your screen to open the side menu.

Select "Budget Star".

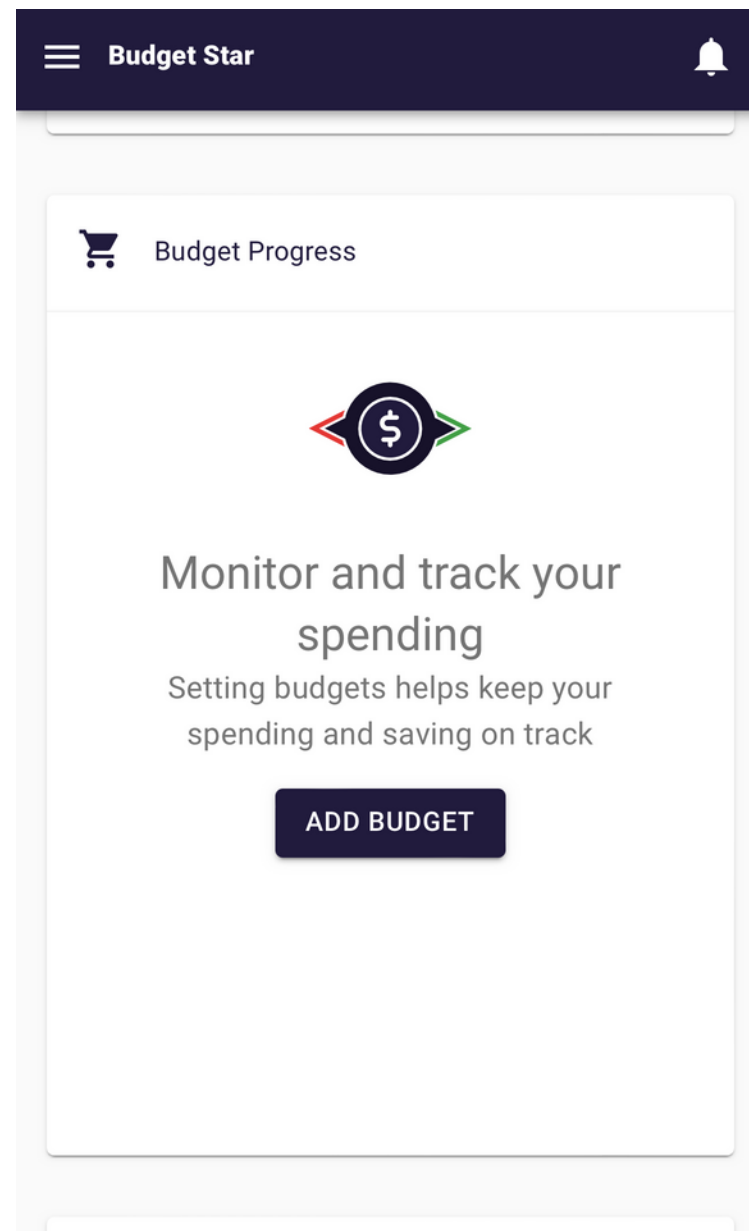


✦ A pop-up will appear with the Budget Star tool. On your dashboard, you will find a series of widgets to help manage your finances.

The first is the "Spending by Category" feature. This breaks your spending down into categories to see where you are spending most of your funds,

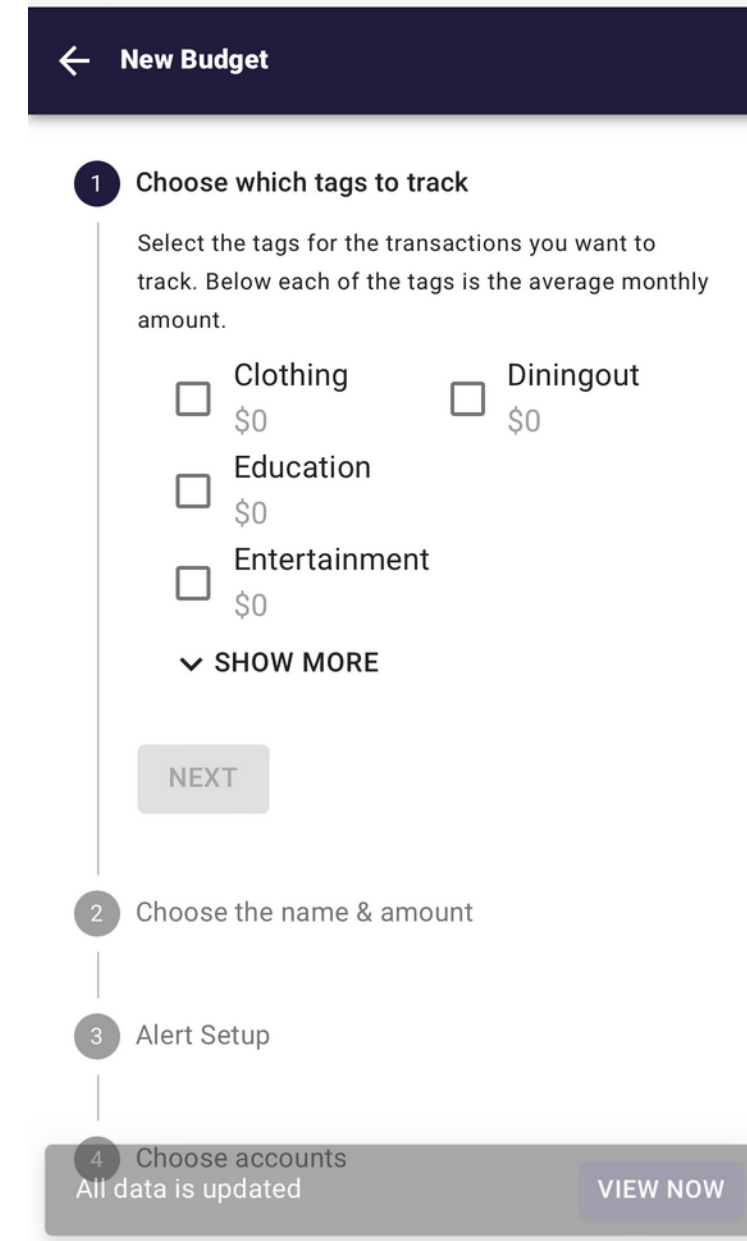
USING BUDGET STAR

Continued



✦ Next you will find the Budget Progress section. Here you can add budgets for different categories to keep tabs on your spending.

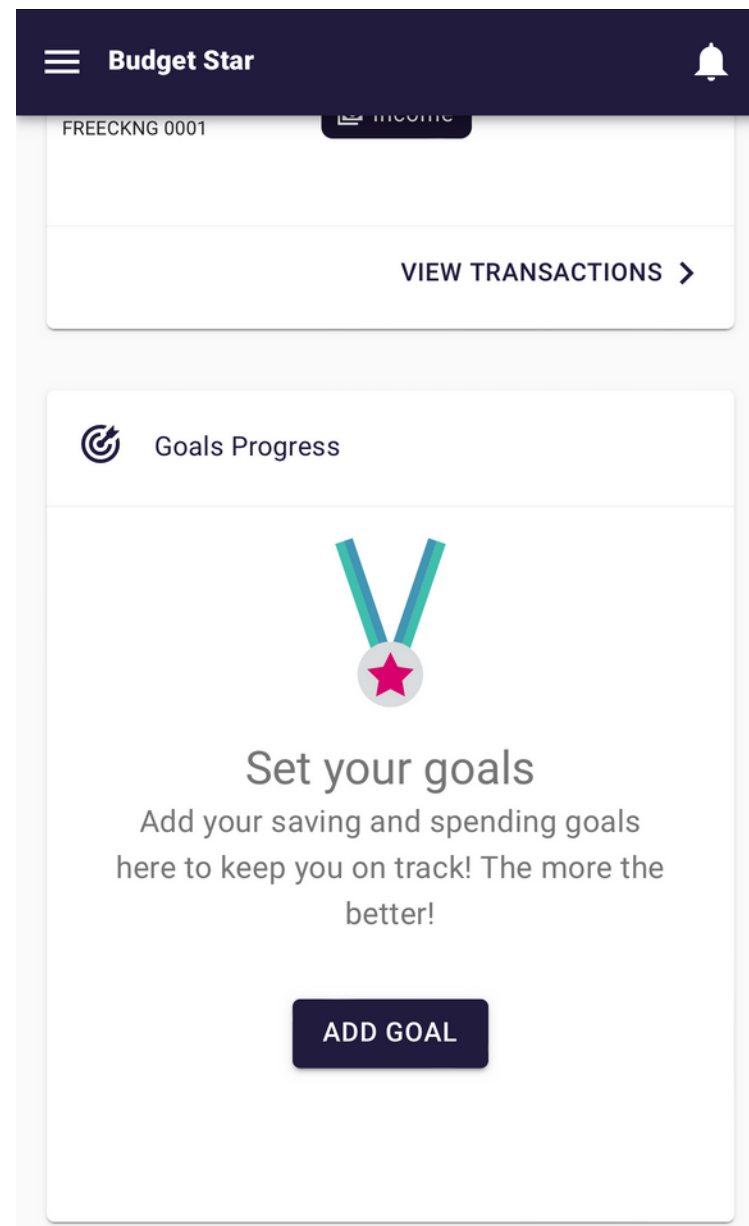
Start by clicking "Add Budget".



✦ Here you can select which category you would like to track, set the budget amount you'd like to stay within, and set up alerts for when you're reaching the limit!

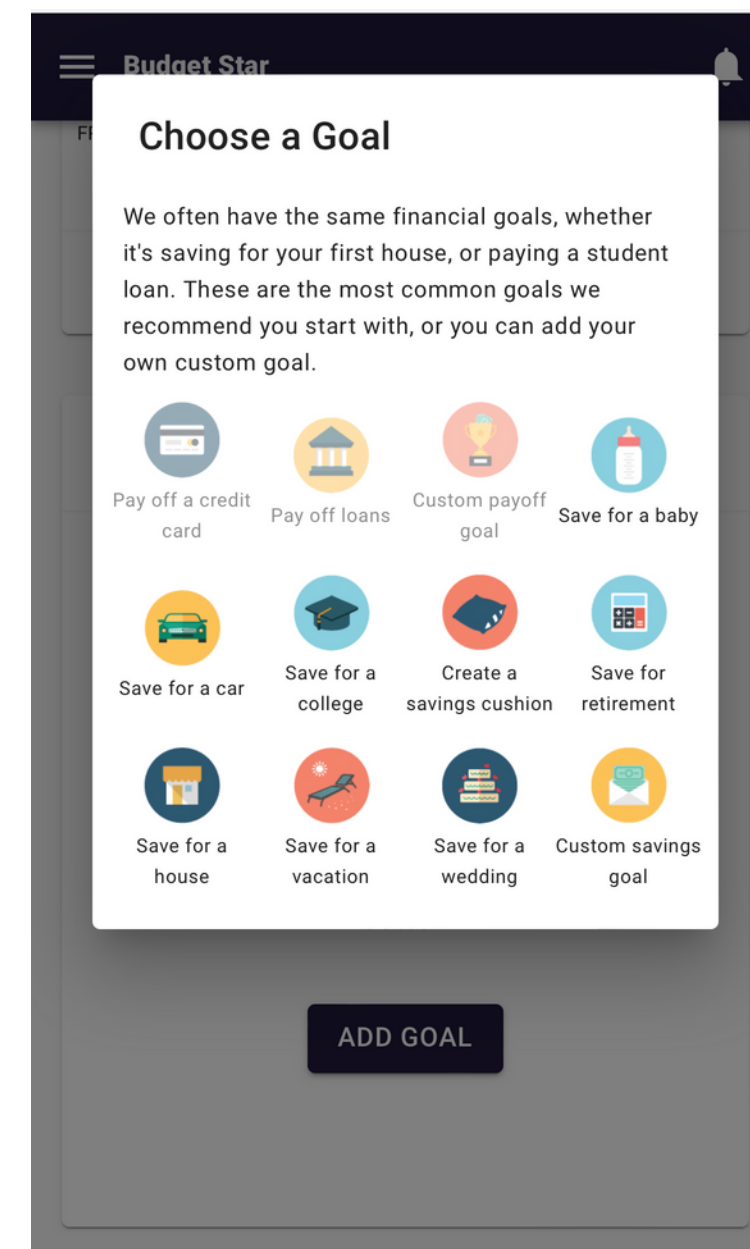
USING BUDGET STAR

Continued



✦ If you're saving for a big purchase, you can choose to "Set A Goal" with Budget Star.

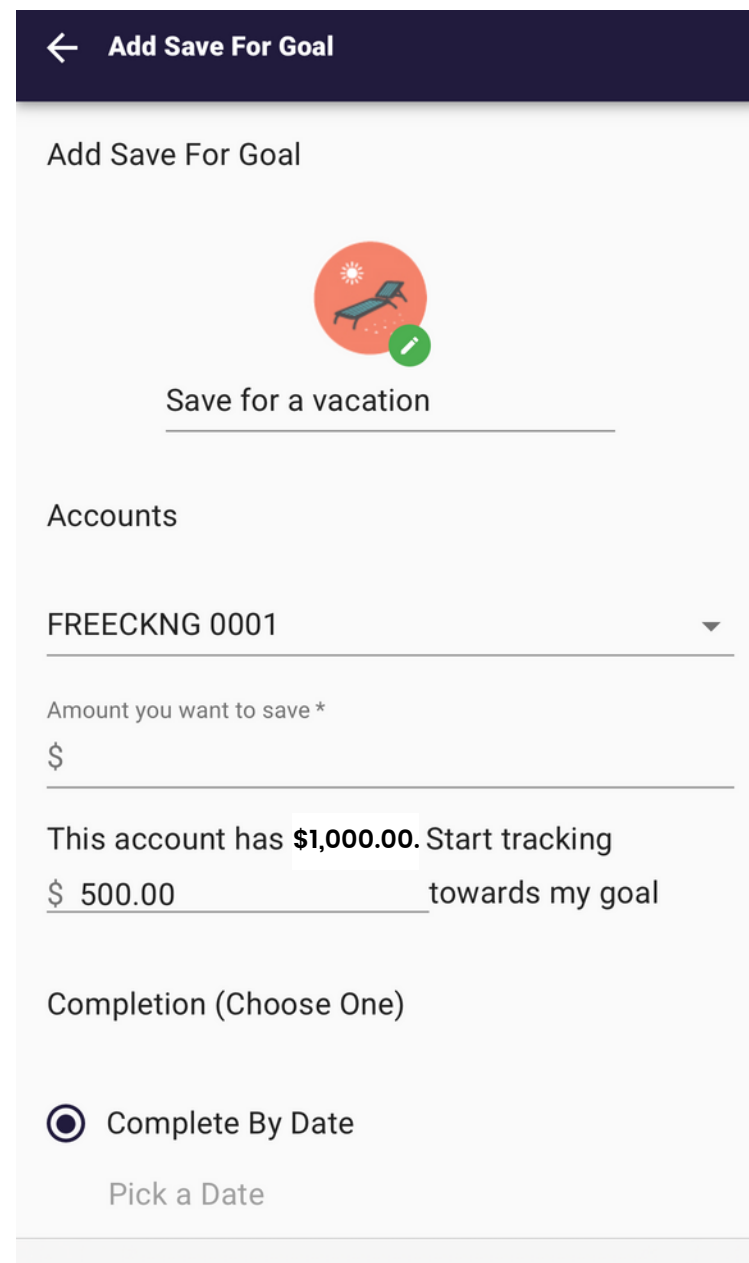
Start by selecting "Add Goal" under the "Goals Progress" section.



✦ Choose a Goal category you want to save towards such as a car, vacation, or loan payoff.

USING BUDGET STAR

Continued



← Add Save For Goal

Add Save For Goal

Save for a vacation

Accounts

FREECKNG 0001

Amount you want to save *

\$

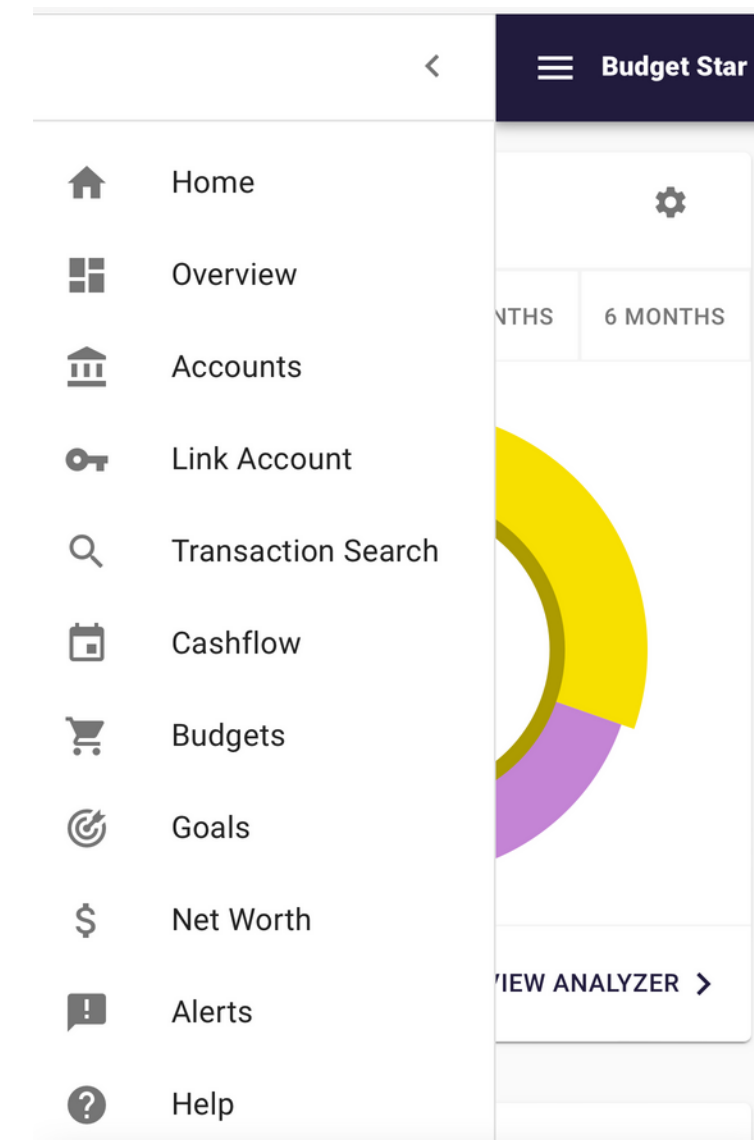
This account has **\$1,000.00**. Start tracking
\$ 500.00 towards my goal

Completion (Choose One)

☒ Complete By Date

Pick a Date

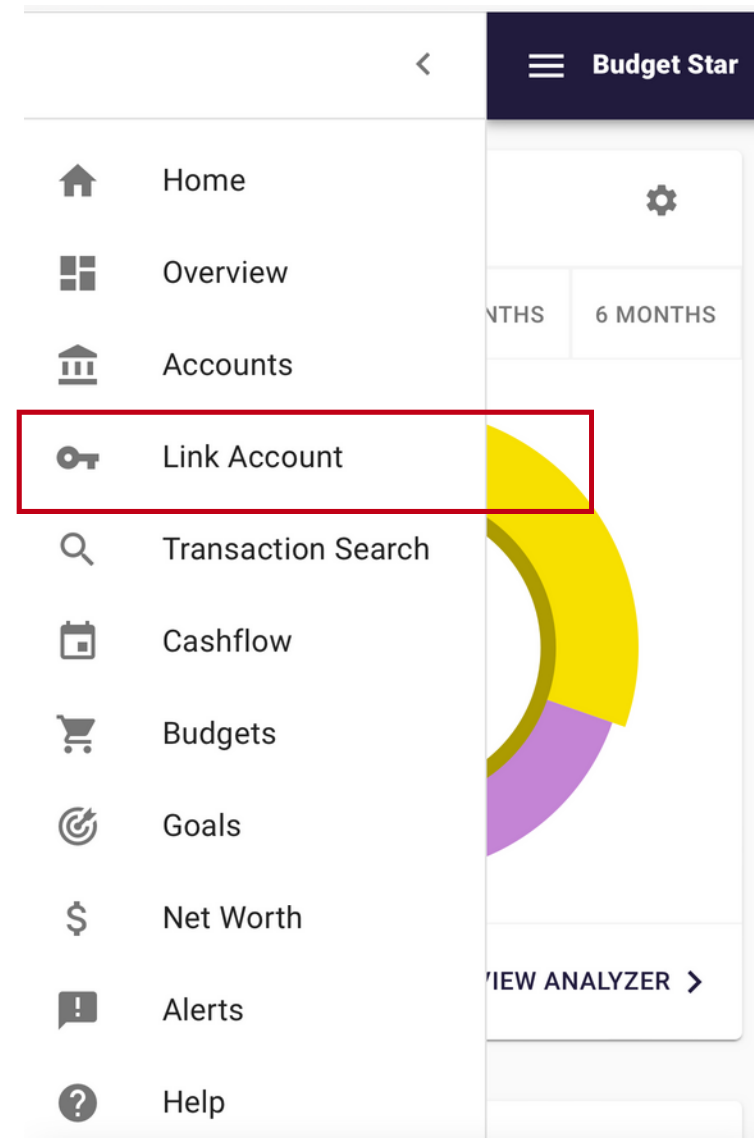
✦ Select the account you want to save in, the amount you need to save, and how much you currently have to put towards your goal.



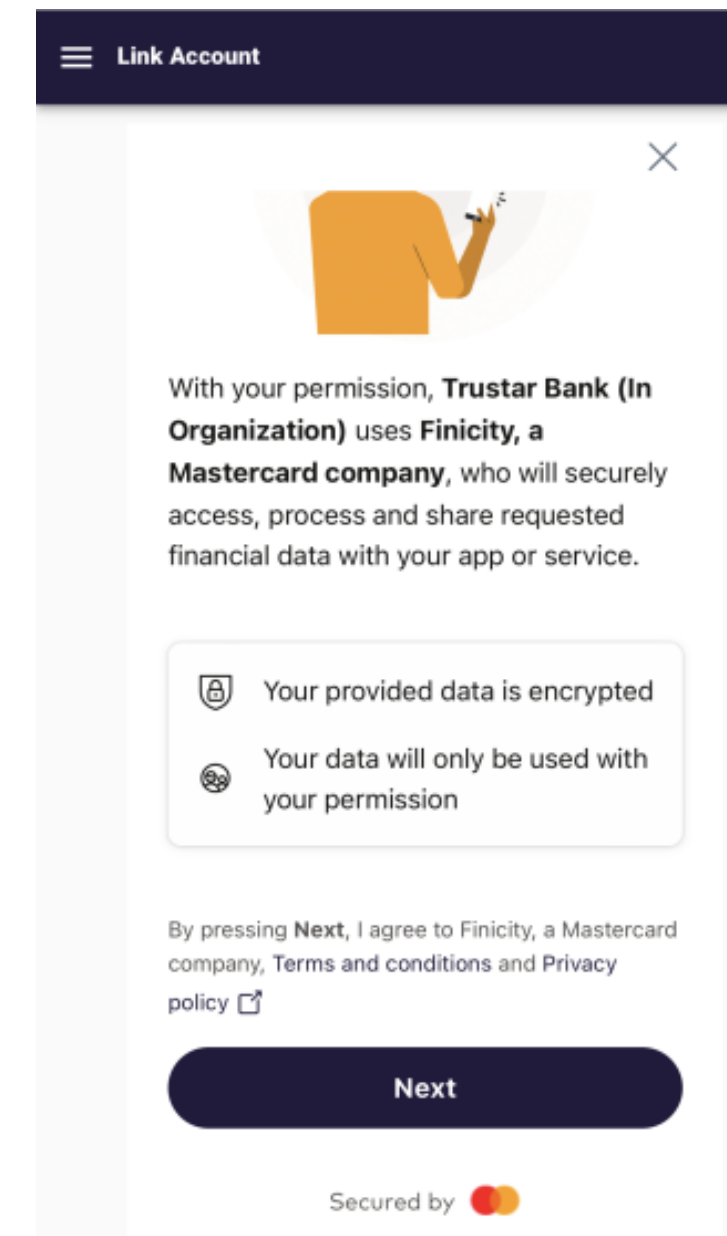
✦ There are a variety of other features you can utilize with Budget Star, such as monitoring incoming cash flow, viewing net worth stats, and keeping an eye on your account activity.

USING BUDGET STAR

Continued



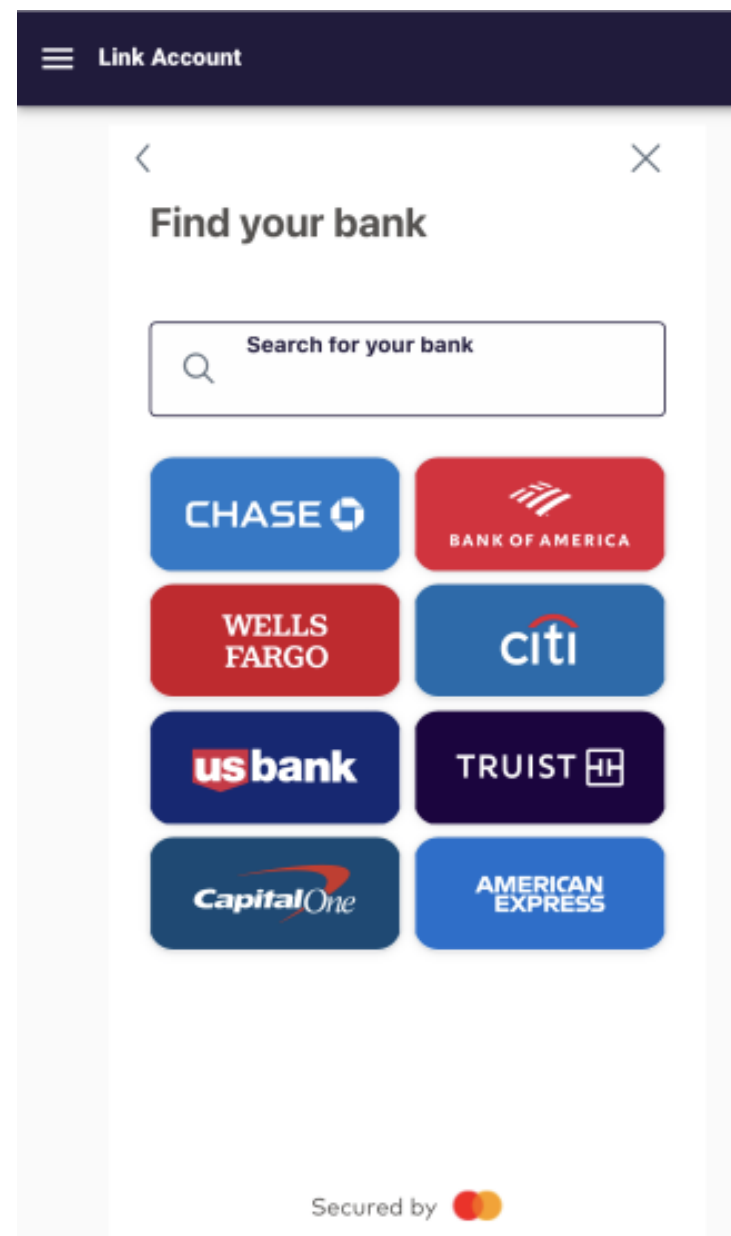
✦ Budget Star also provides the opportunity to link accounts at other banks, allowing you to consolidate your transactions, managing all of your spending tendencies in one convenient application.



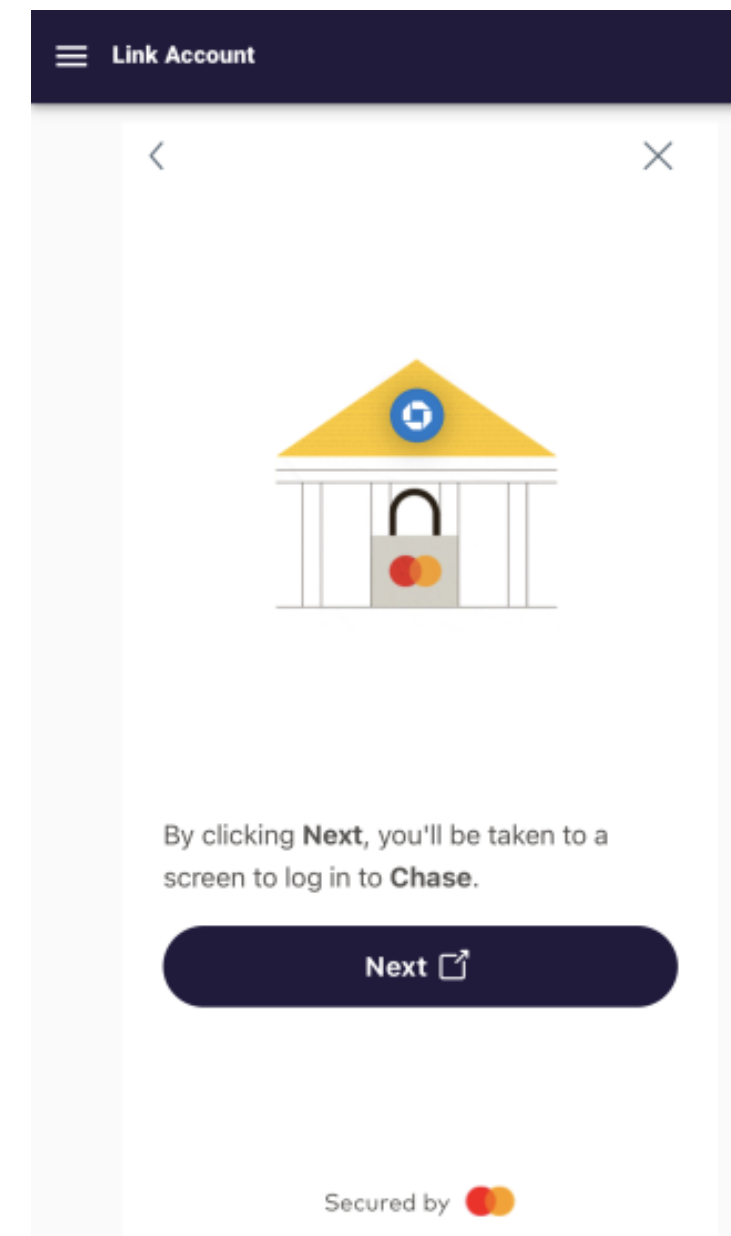
✦ Users will need to accept the Terms and Conditions and Privacy Policy before continuing.

USING BUDGET STAR

Continued



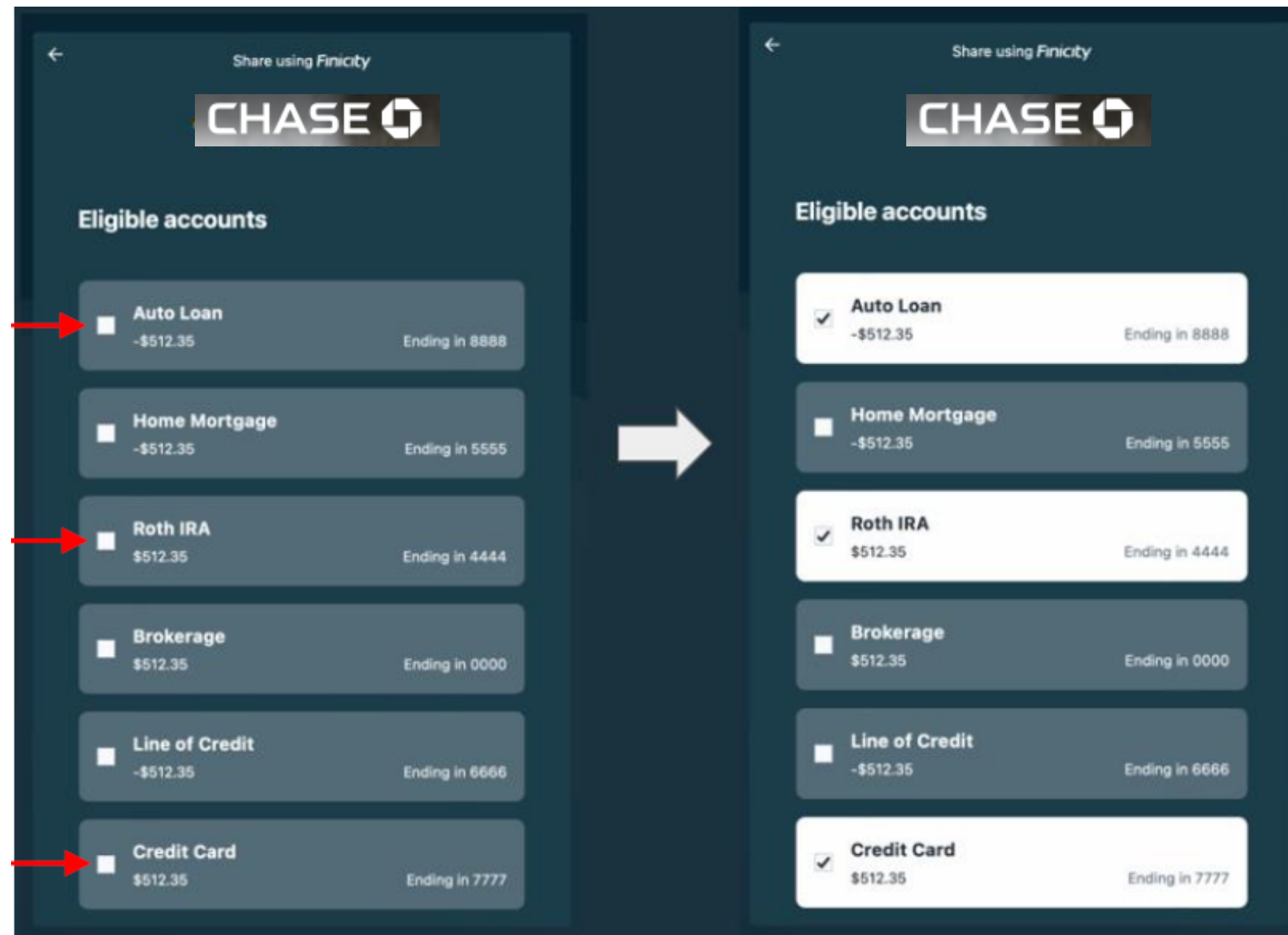
✦ While there are eight default financial institutions on the option screen, simply use the search field to locate the full directory of available banks.



✦ After selecting the financial institution to link, the user will be alerted to the need to log into their profile. The user will then be automatically directed to the financial institution's login screen.

USING BUDGET STAR

Continued



- ✦ Once the user is able to access their financial institution, they will select which accounts they would like to aggregate by clicking the box next to each account.

TRADITIONAL MOBILE BANKING CAPABILITIES

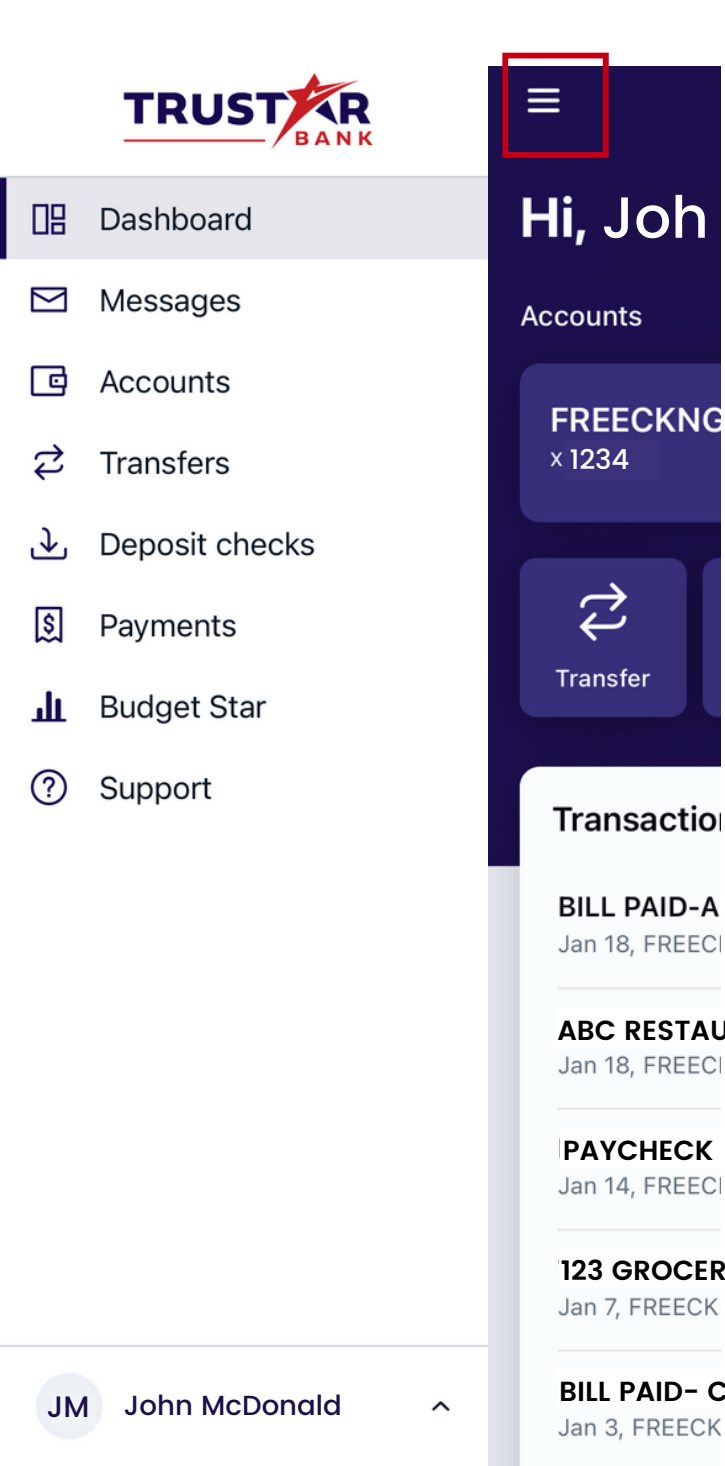
Your bank is open 24/7 with our convenient mobile banking app.

Discover that you have misplaced your Trustar debit card? Not to worry. You can place a hold on your card, blocking all transactions with the swipe of your finger.

Deposit checks, schedule an internal transfer, even order new checks – all from your phone at a time that works best for you.

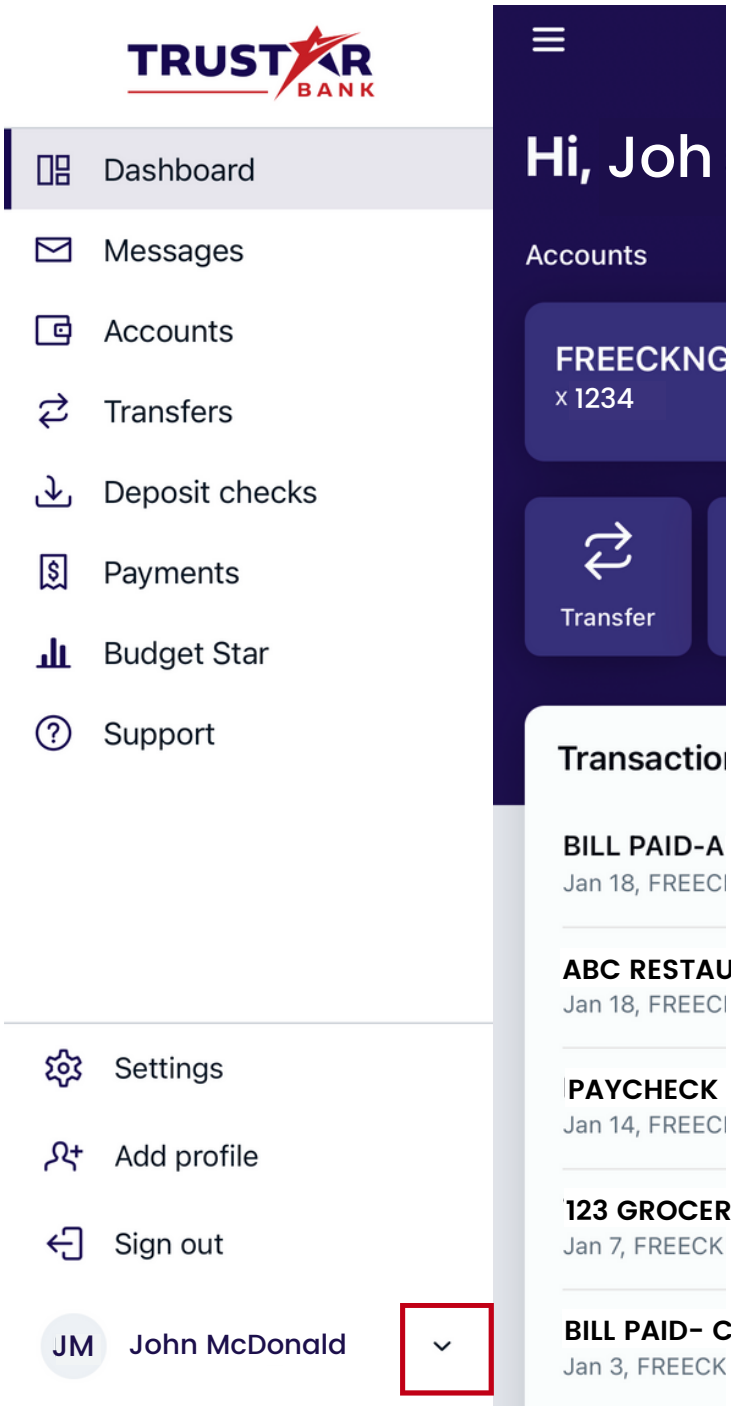
ACCOUNT SETTINGS

Change various settings of your mobile app.



Step 1

★ On the home page, click the icon on the top left of your screen to open the side menu.



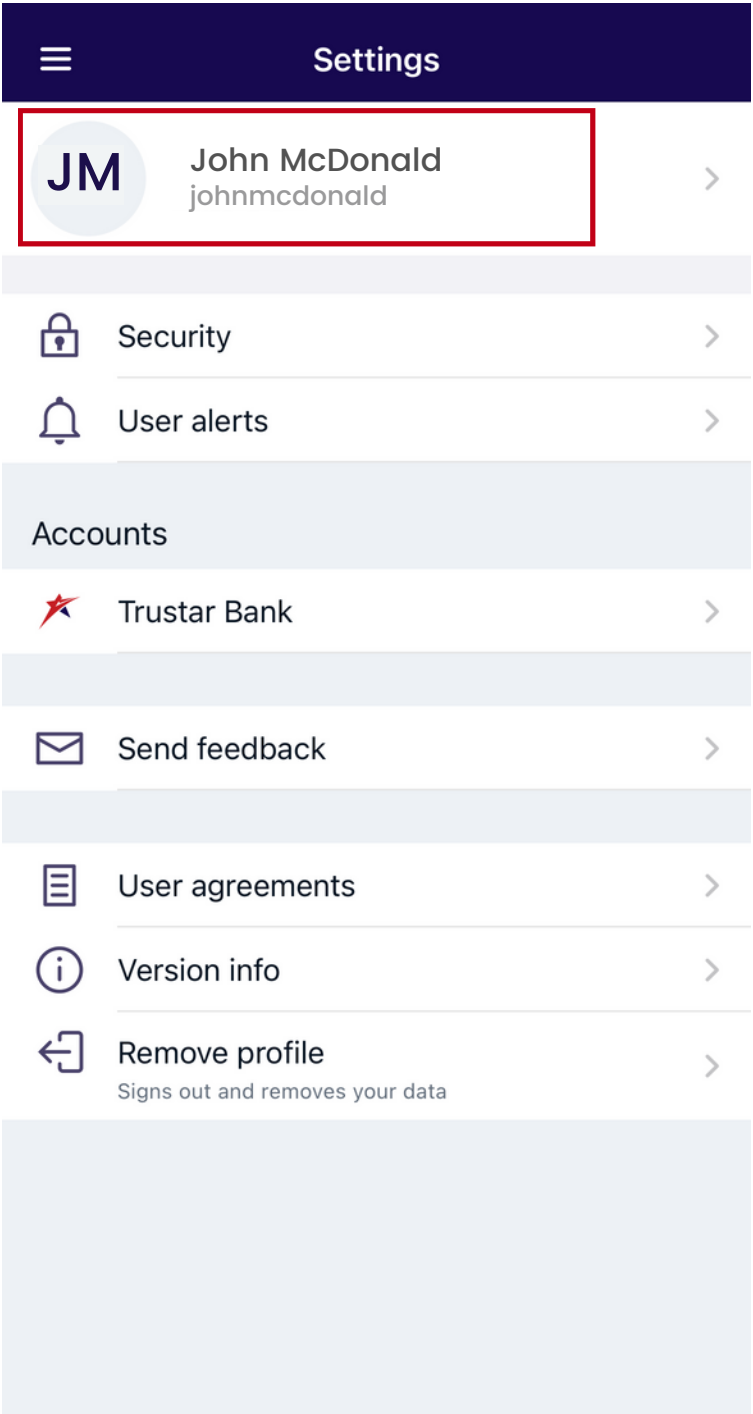
Step 2

★ Then, click the arrow on the bottom right of the menu, next to your name.

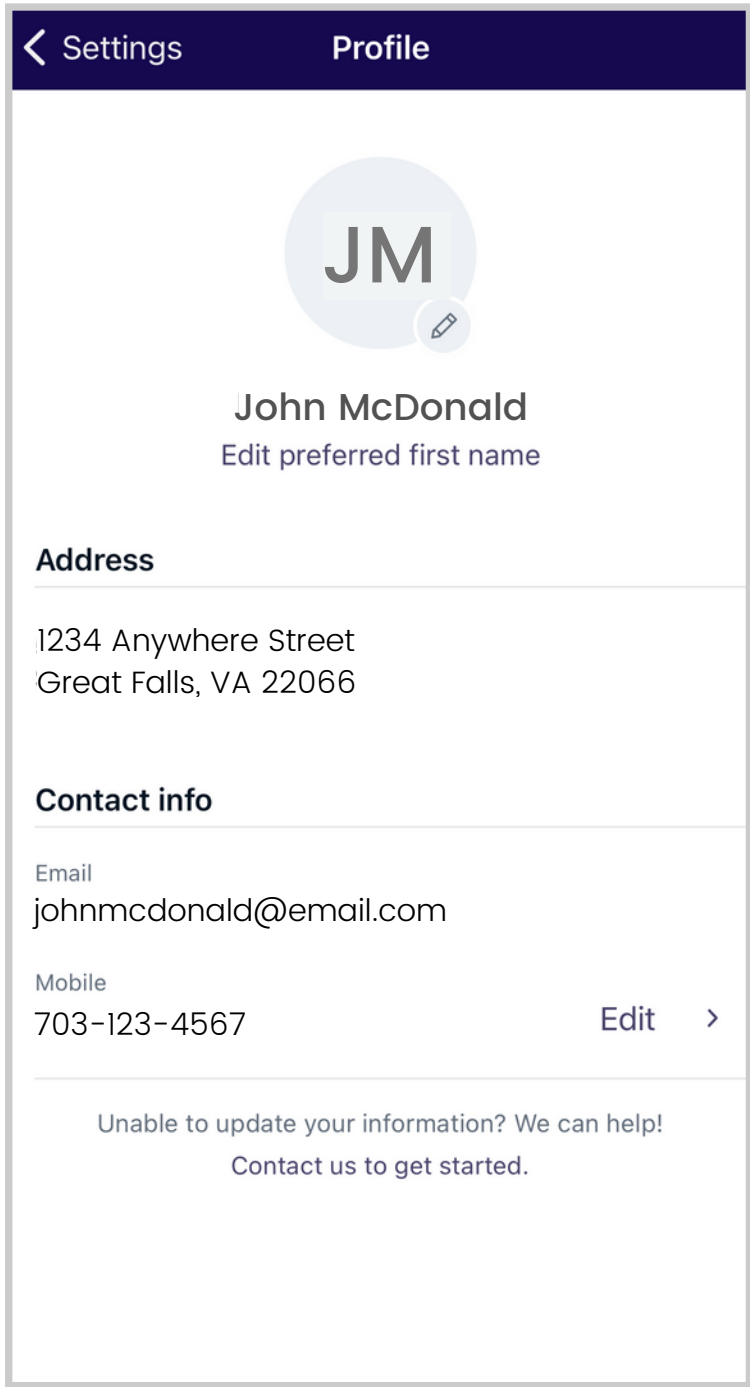
This will expand another menu with a few more options. Click "Settings".

ACCOUNT SETTINGS

Continued



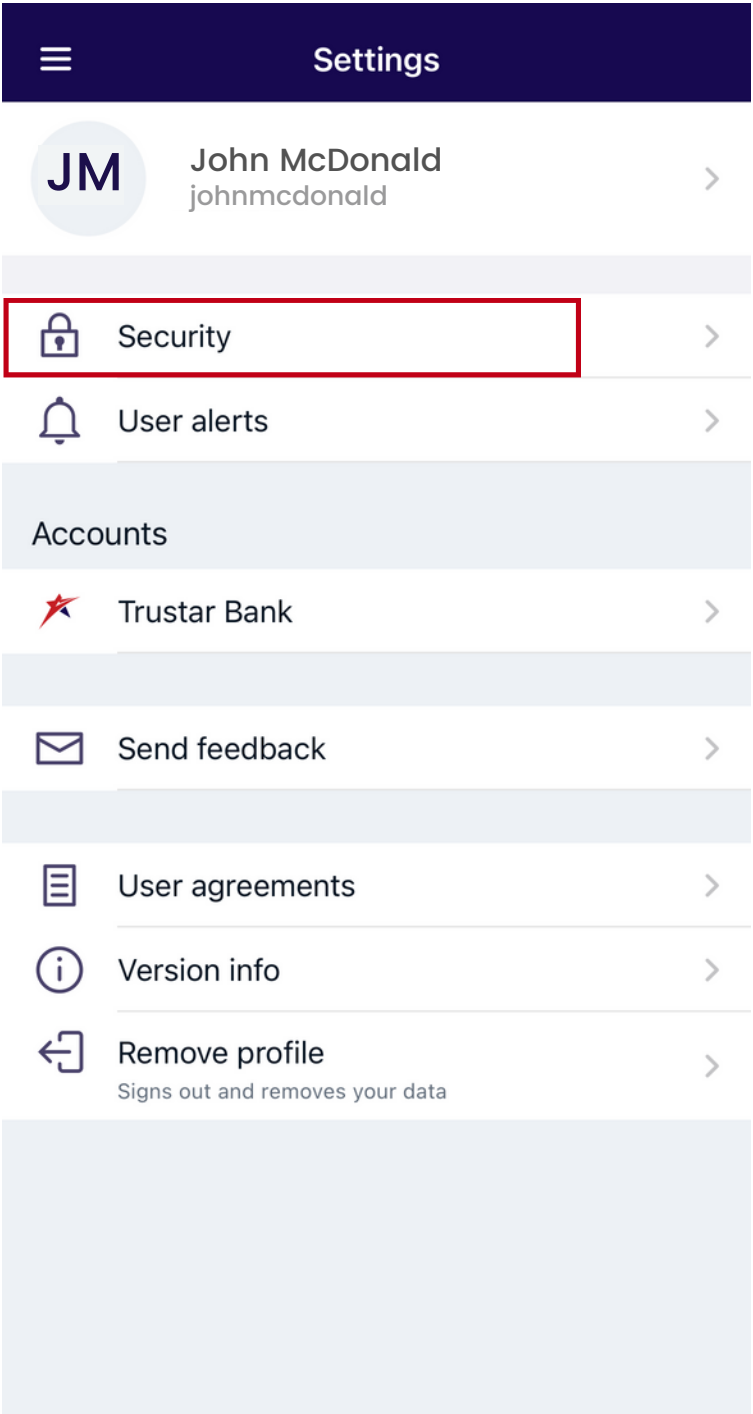
★ On this page, you have several options. Let's start with clicking your name on the first line.



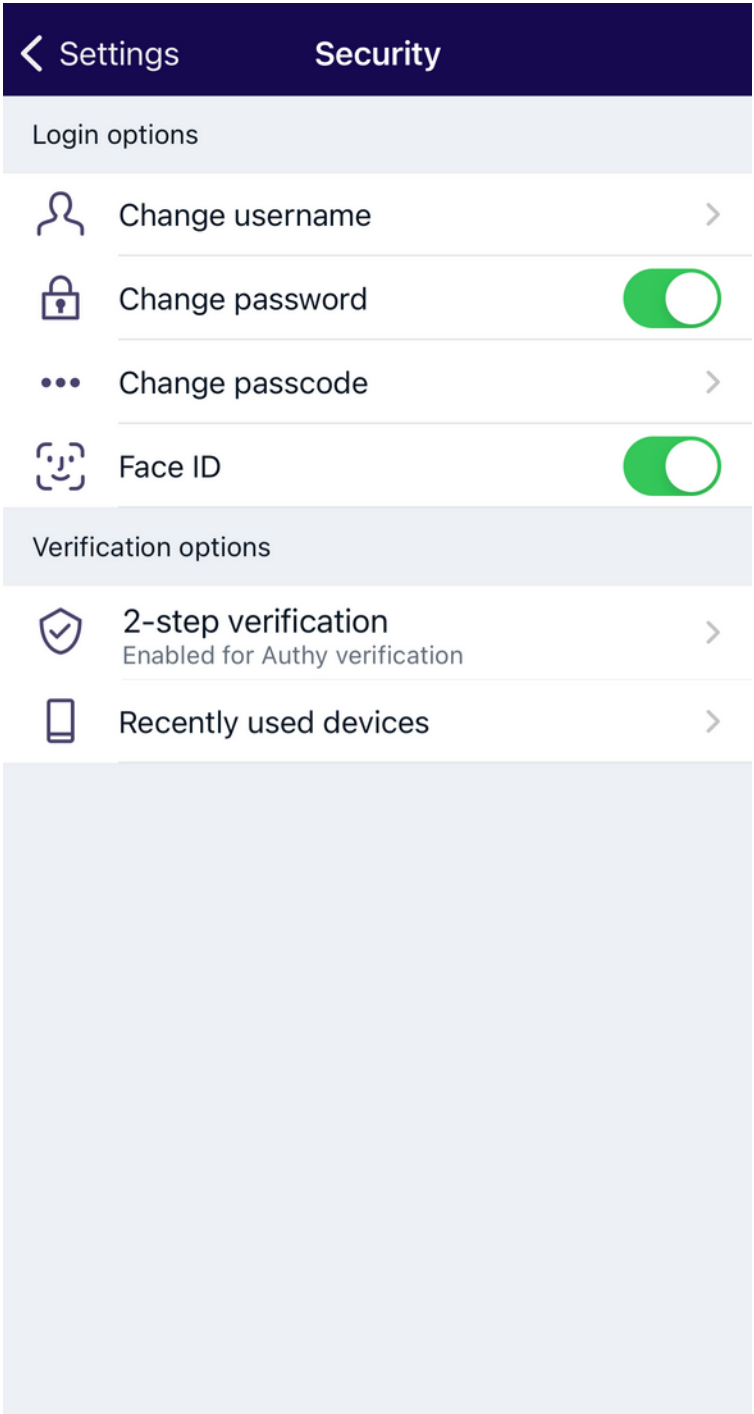
★ Here you can view various pieces of information about yourself, such as your profile photo, preferred first name, address, and contact info.

ACCOUNT SETTINGS

Continued



⚡ Back on the Settings menu page, let's click on "Security".

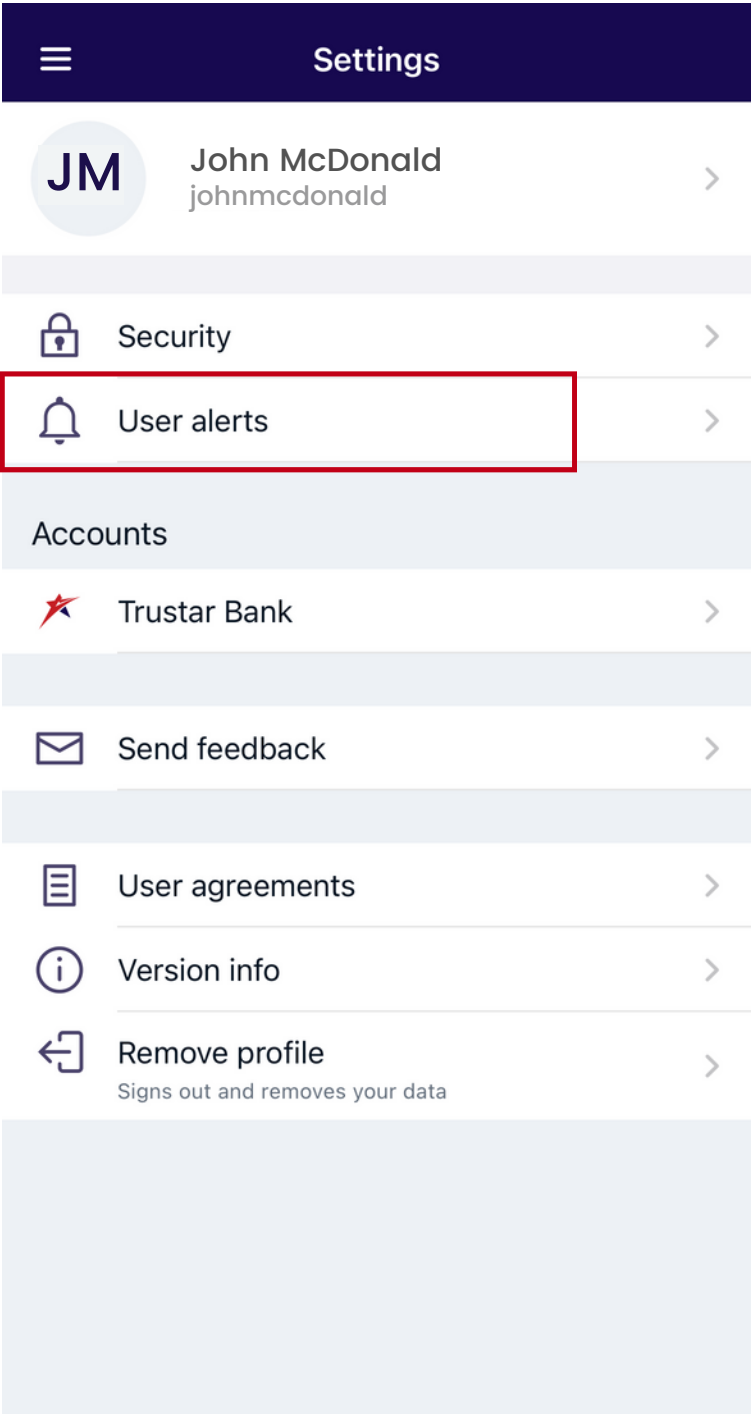


⚡ Here you can change your username, password, passcode, or enable or disable Face ID.

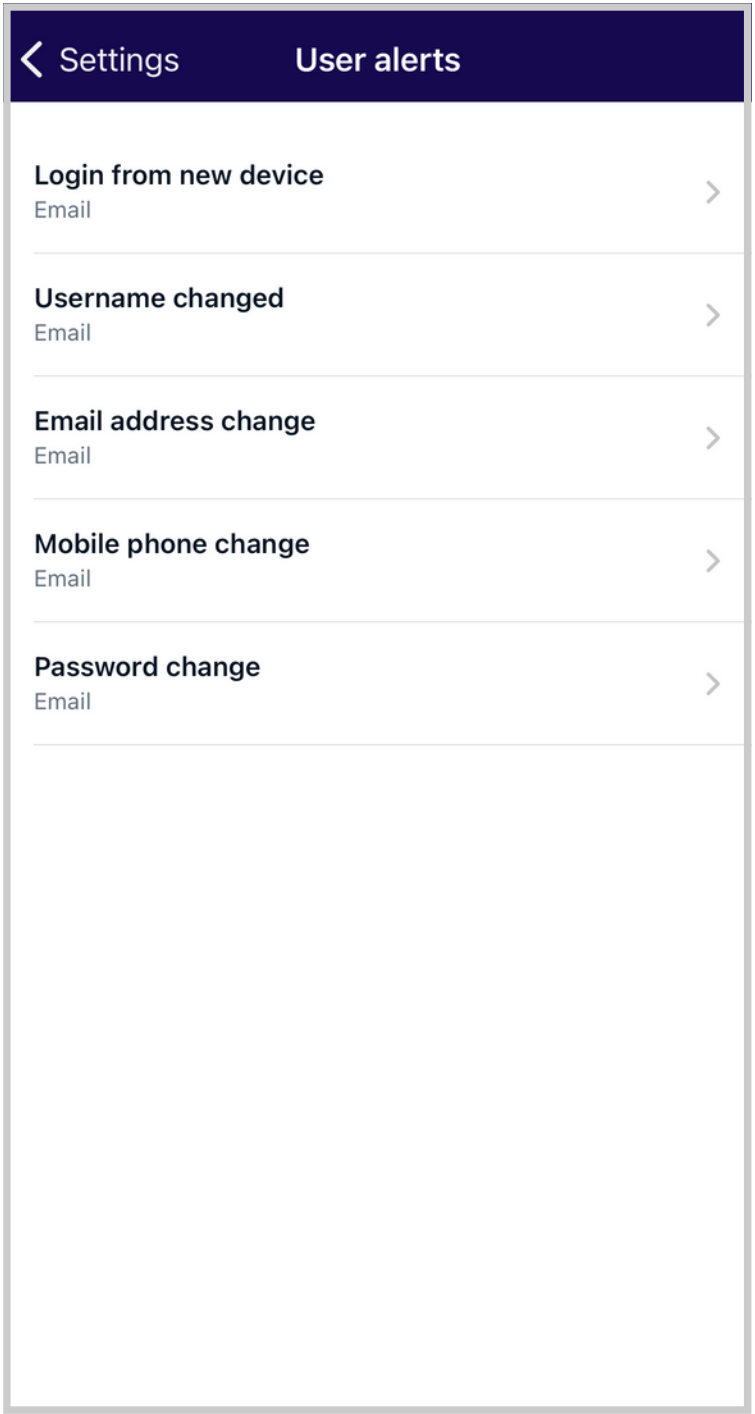
You can also enable 2-step verification here or check any devices that were recently used to sign into your account.

ACCOUNT SETTINGS

Continued



Back on the Settings menu page, let's click on "User alerts".

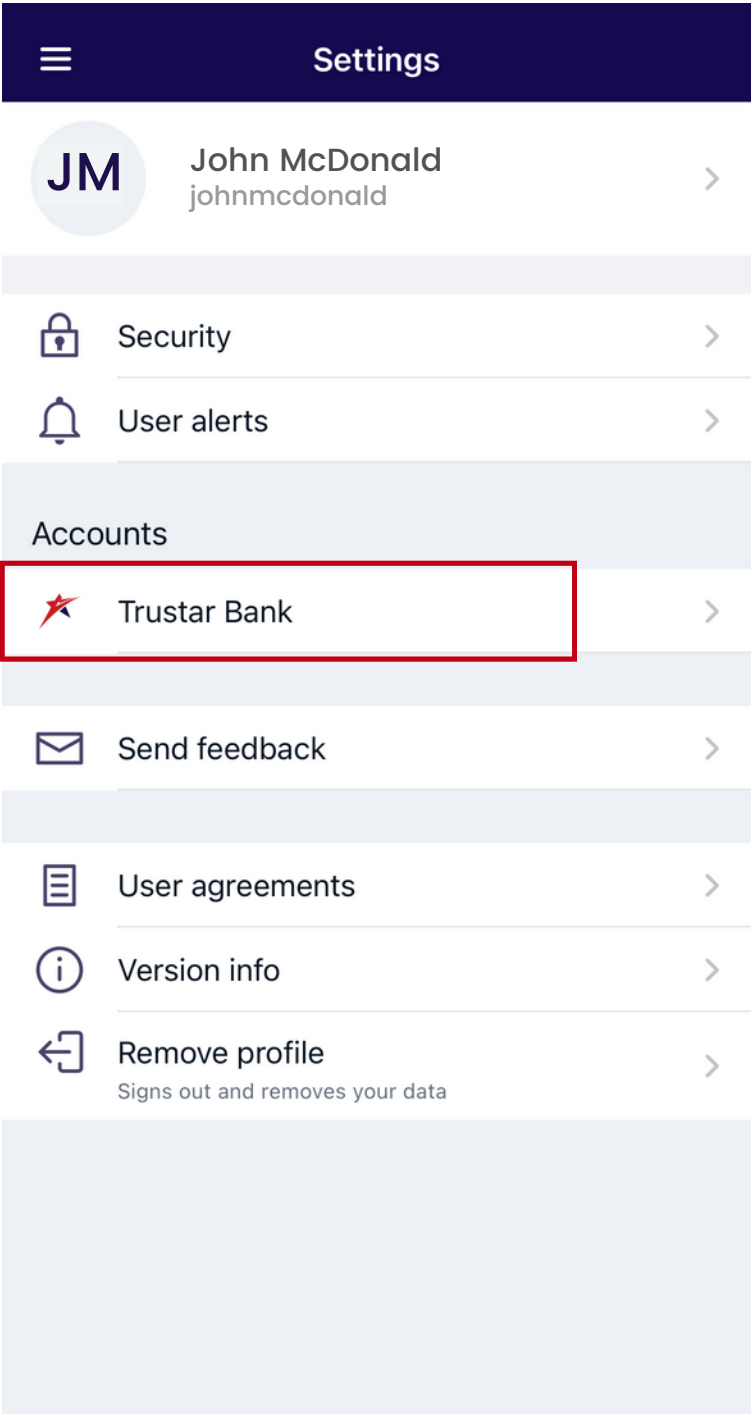


Here you can choose how you want to be alerted about certain events, such as when your password or phone number is changed.

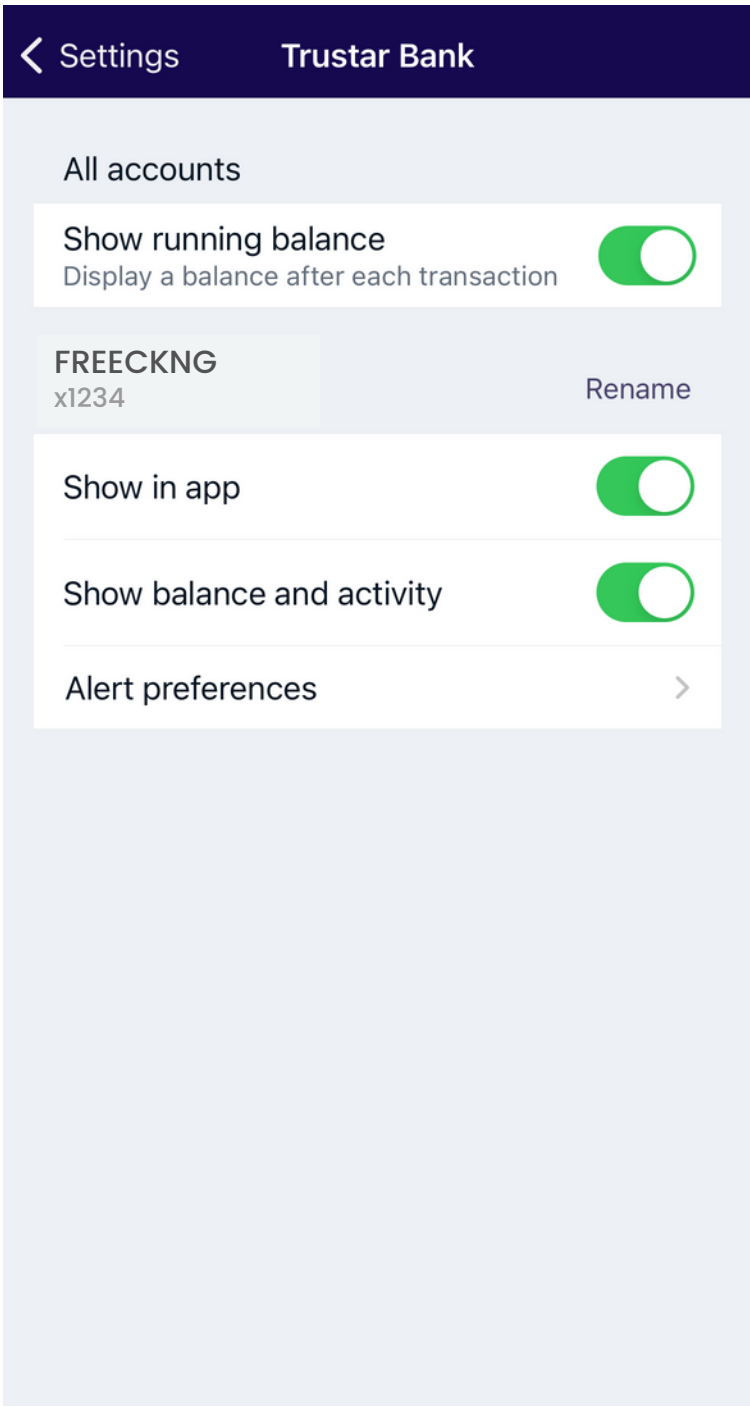
Click on any field to change how you would like to be notified.

ACCOUNT SETTINGS

Continued



⚡ Back on the Settings menu page, let's click on "Trustar Bank".

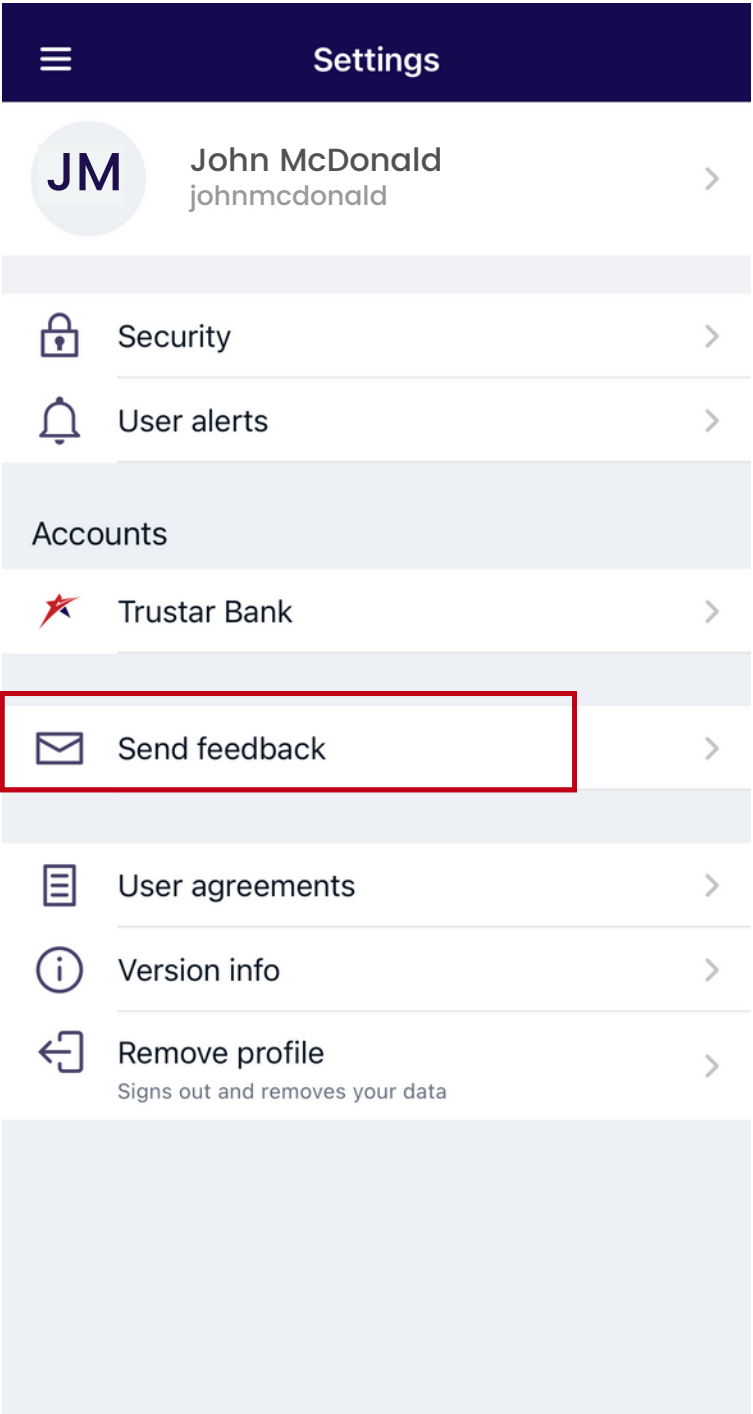


⚡ Here you can choose certain things about how your accounts are displayed.

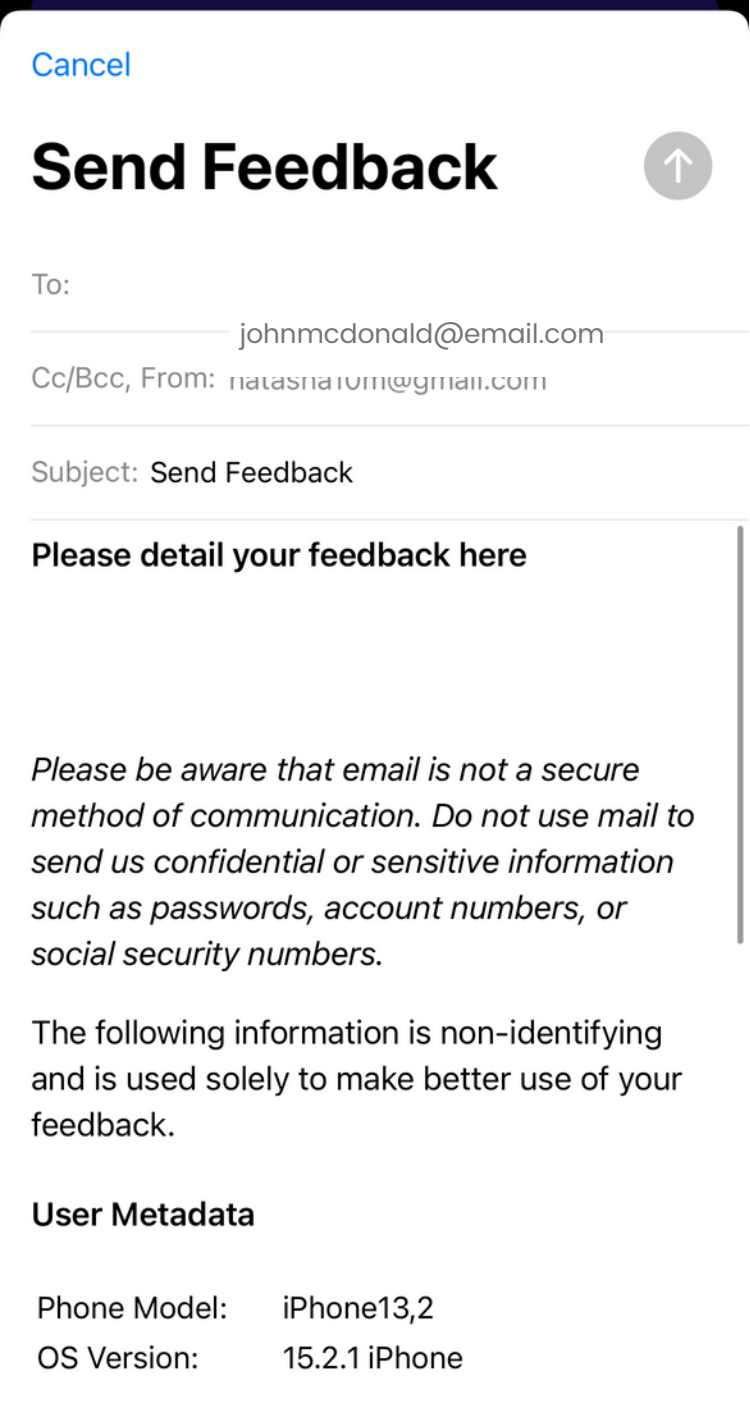
You can also nickname your accounts here by clicking "Rename" next to any account.

ACCOUNT SETTINGS

Continued



Back on the Settings menu page, let's click on "Send Feedback".

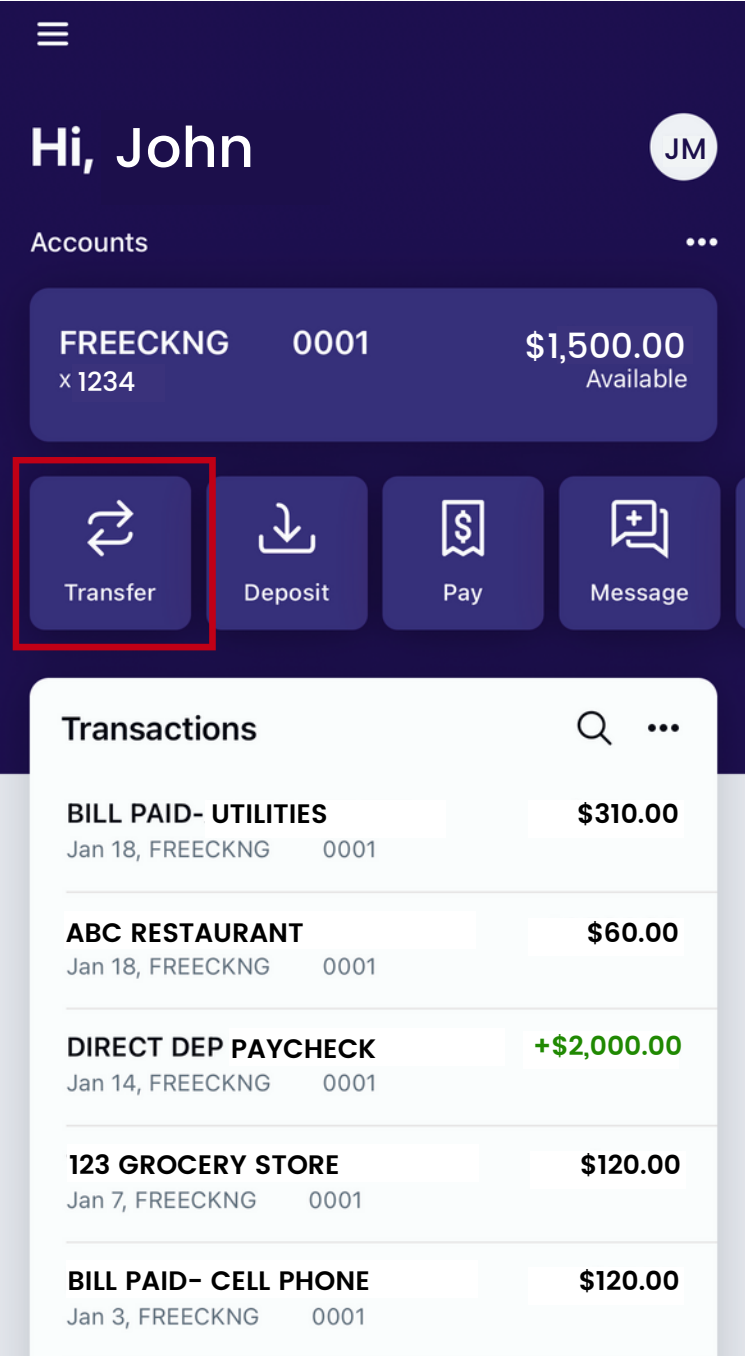


An e-mail pop-up will appear where you can send a message to our team about any questions or issues you may be experiencing while using the app.

Please use this feature solely for technical issues, and not any banking related questions.

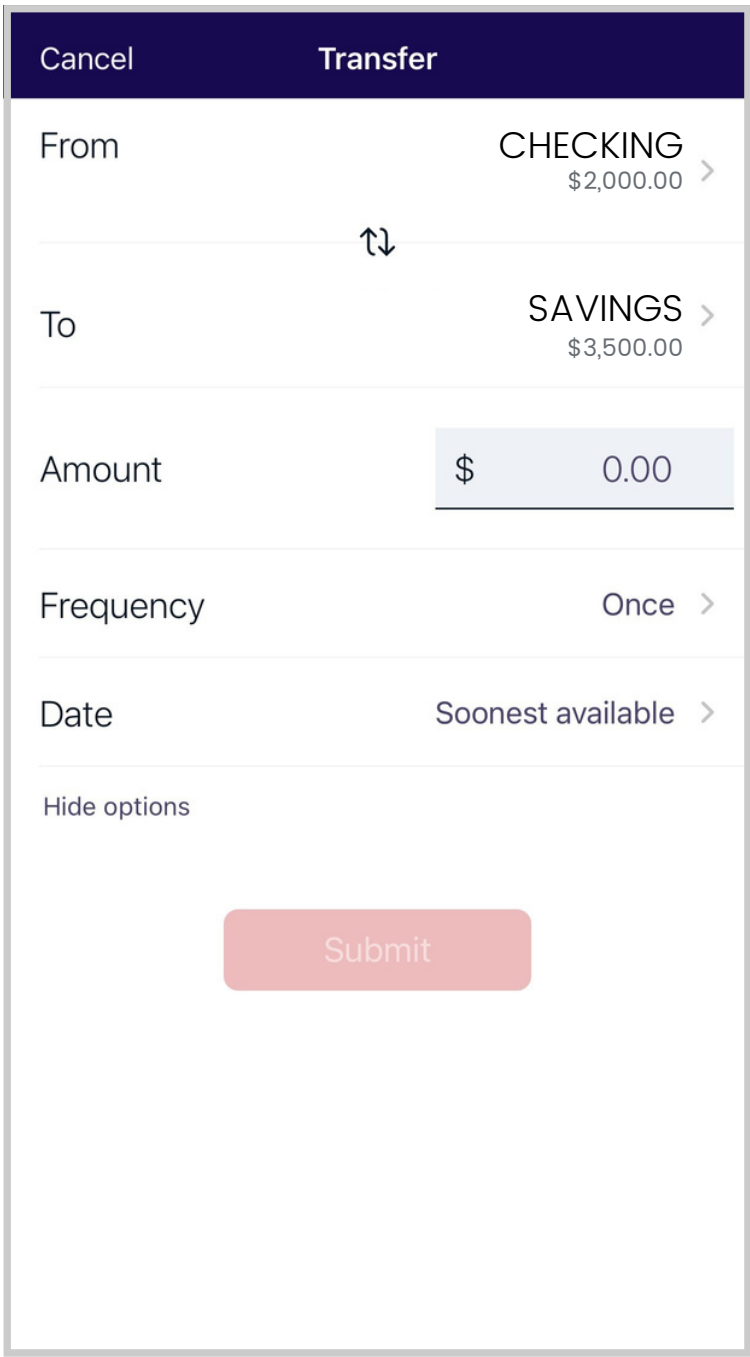
MAKING A TRANSFER

Learn how to easily transfer funds from one Trustar Bank account to another.



Step 1

Once signed into Trustar Bank's Online Banking mobile app, select the Transfer icon.



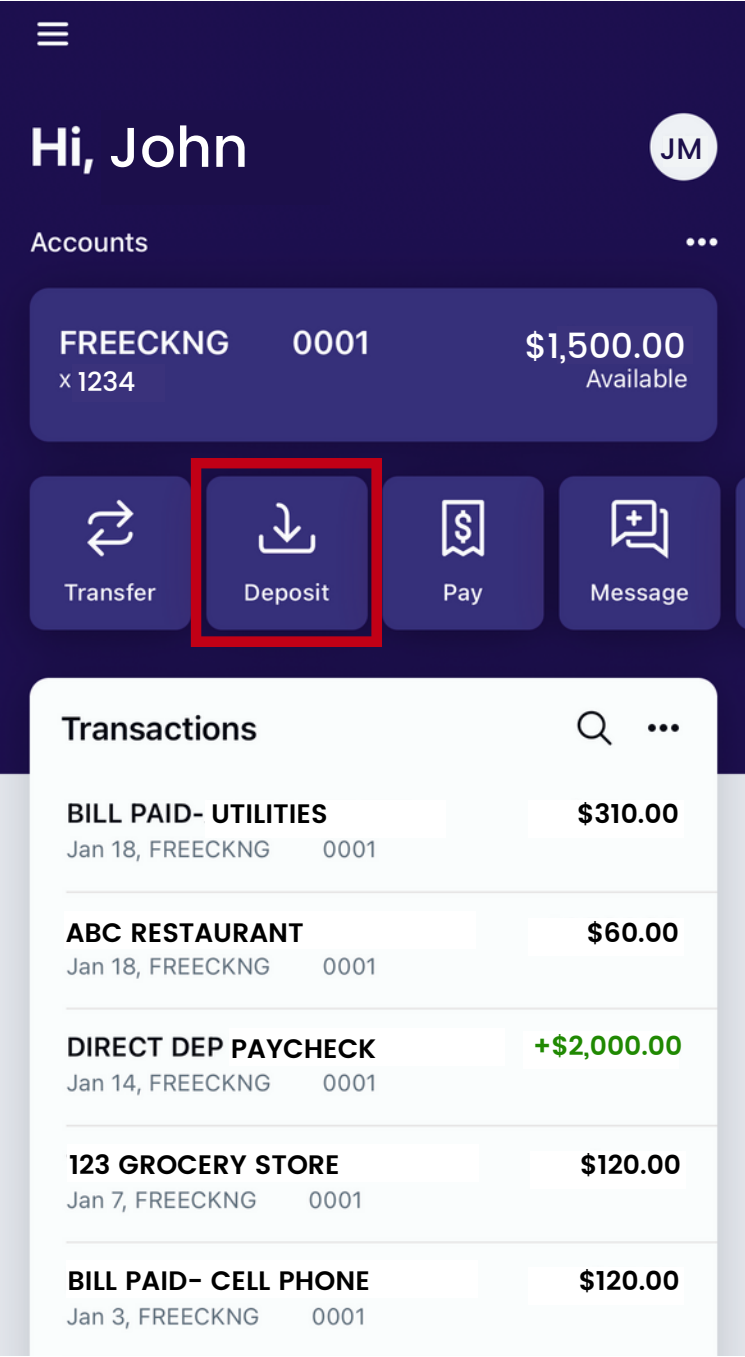
Step 2

Here you can choose which Trustar accounts you would like to transfer to and from, the amount, the frequency, and the date of the transfer.

Click "Submit" when complete. You can always edit or cancel scheduled transfers from the transfers view.

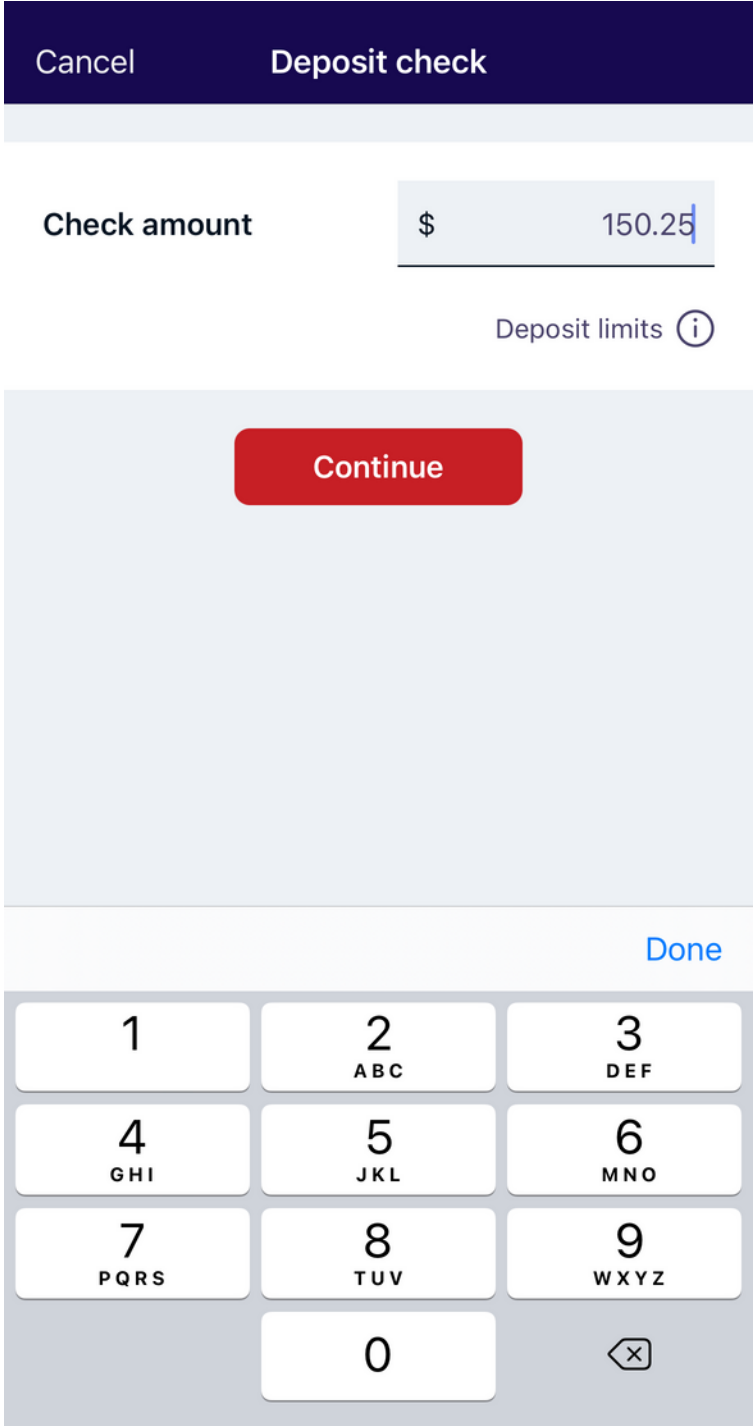
DEPOSITING CHECKS

Deposit a check quickly, right from your phone!



Step 1

Once signed into Trustar Bank's Online Banking mobile app, select the Deposit icon.

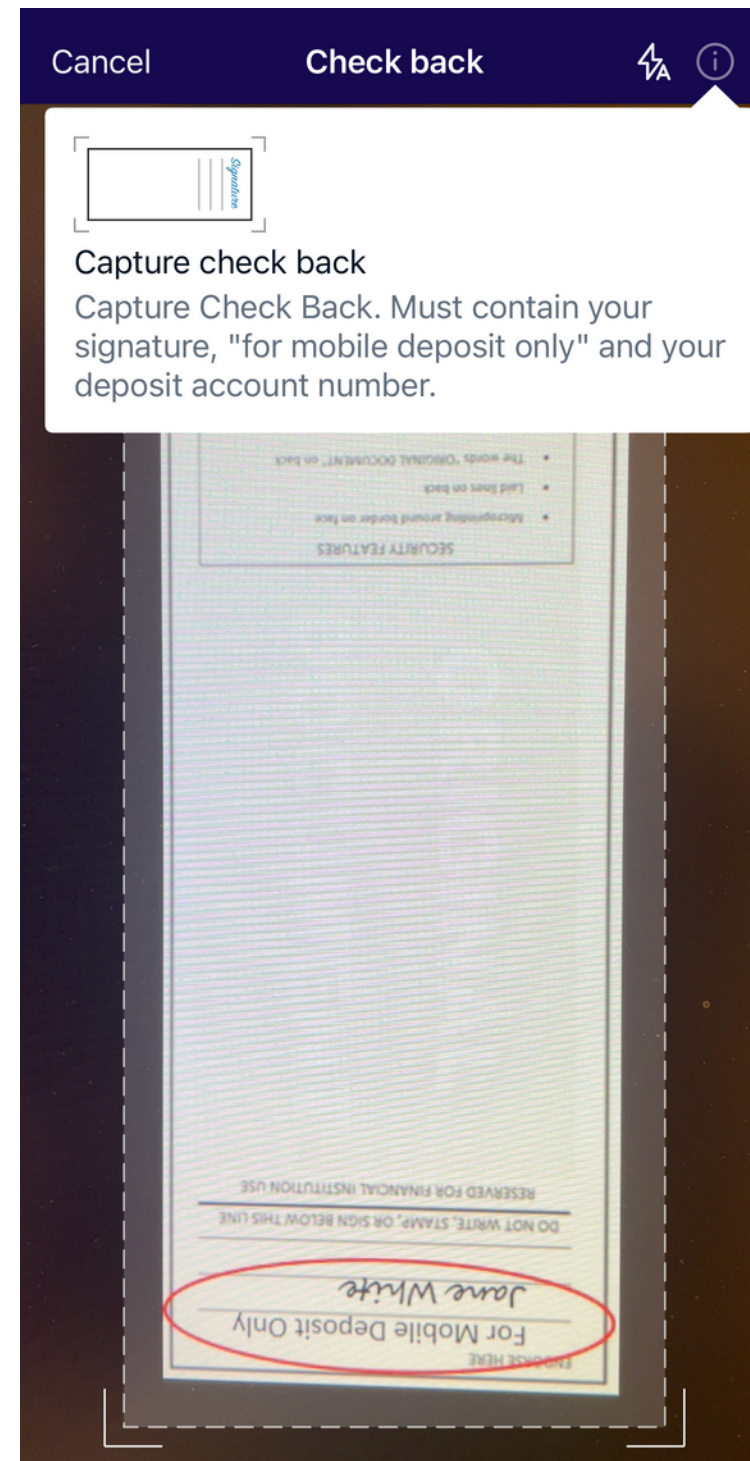
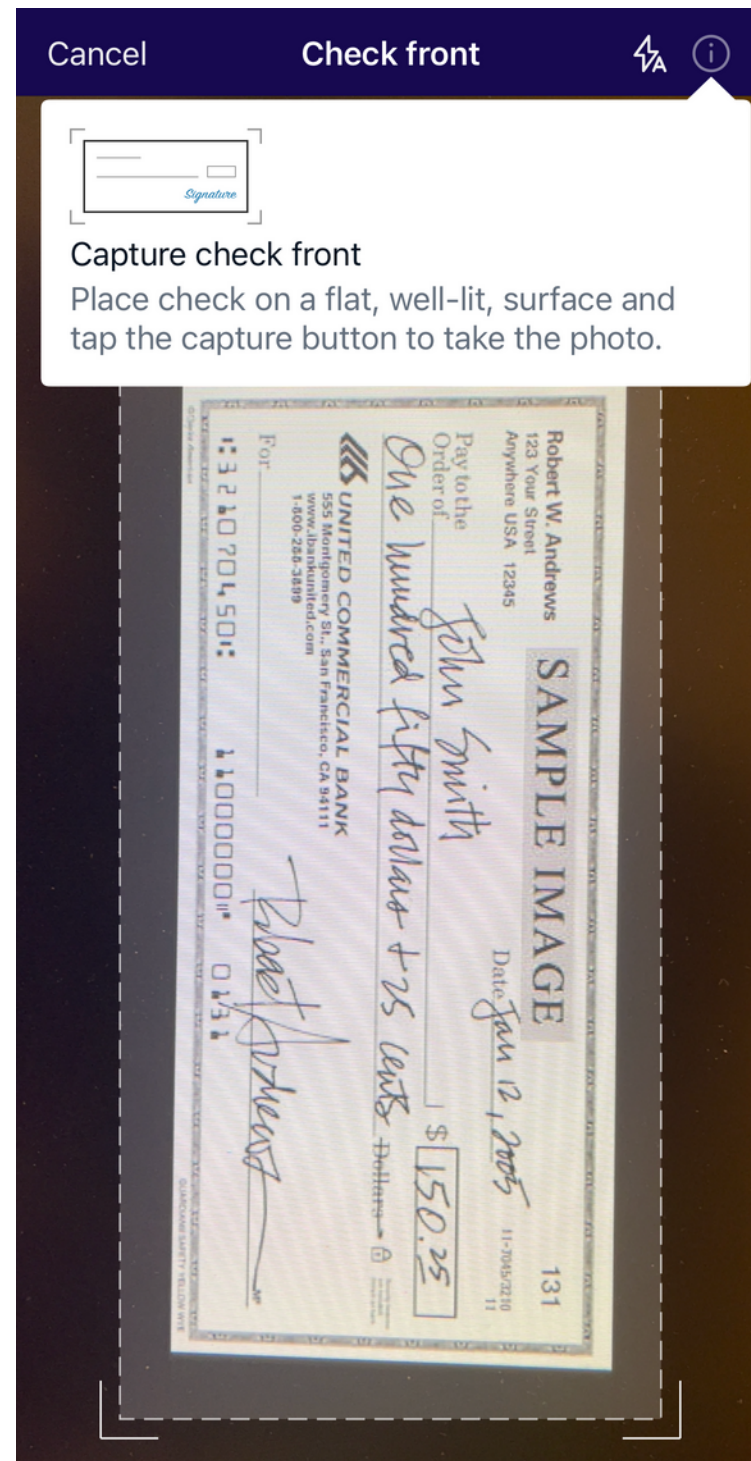


Step 2

Enter the dollar amount of the check you are depositing. Select "Continue".

DEPOSITING CHECKS

Continued



Step 3

- ✦ Capture images of the front and back of your check by centering the check in the middle of the frame and tapping the screen.

On the back, make sure to endorse the check, add "for mobile deposit only" and your deposit account number.

DEPOSITING CHECKS

Continued

Cancel

Review

Check amount

\$150.25

To

FREECKNG 0001 (1234) >

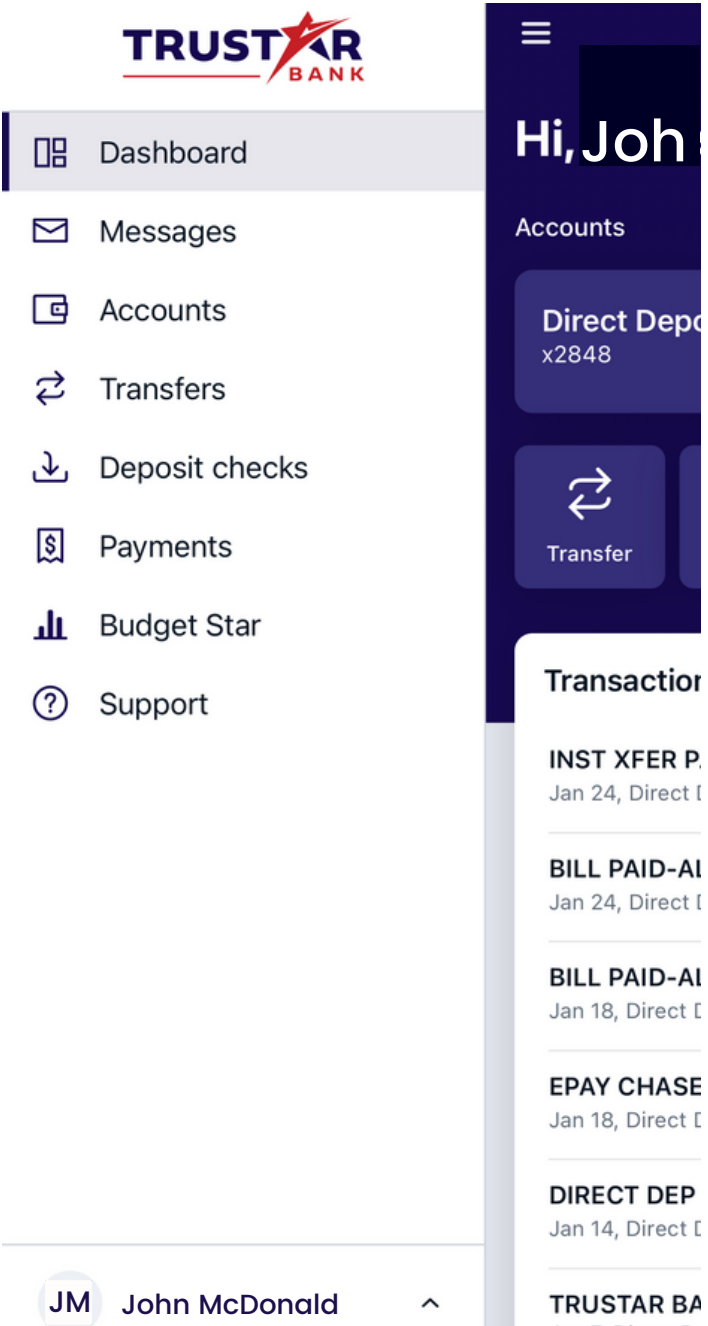
Front

Back

Submit

Step 4

⚡ Review all information, such as amount and account number and hit "submit". Deposited checks will be made available in accordance with our standard funds availability disclosure.

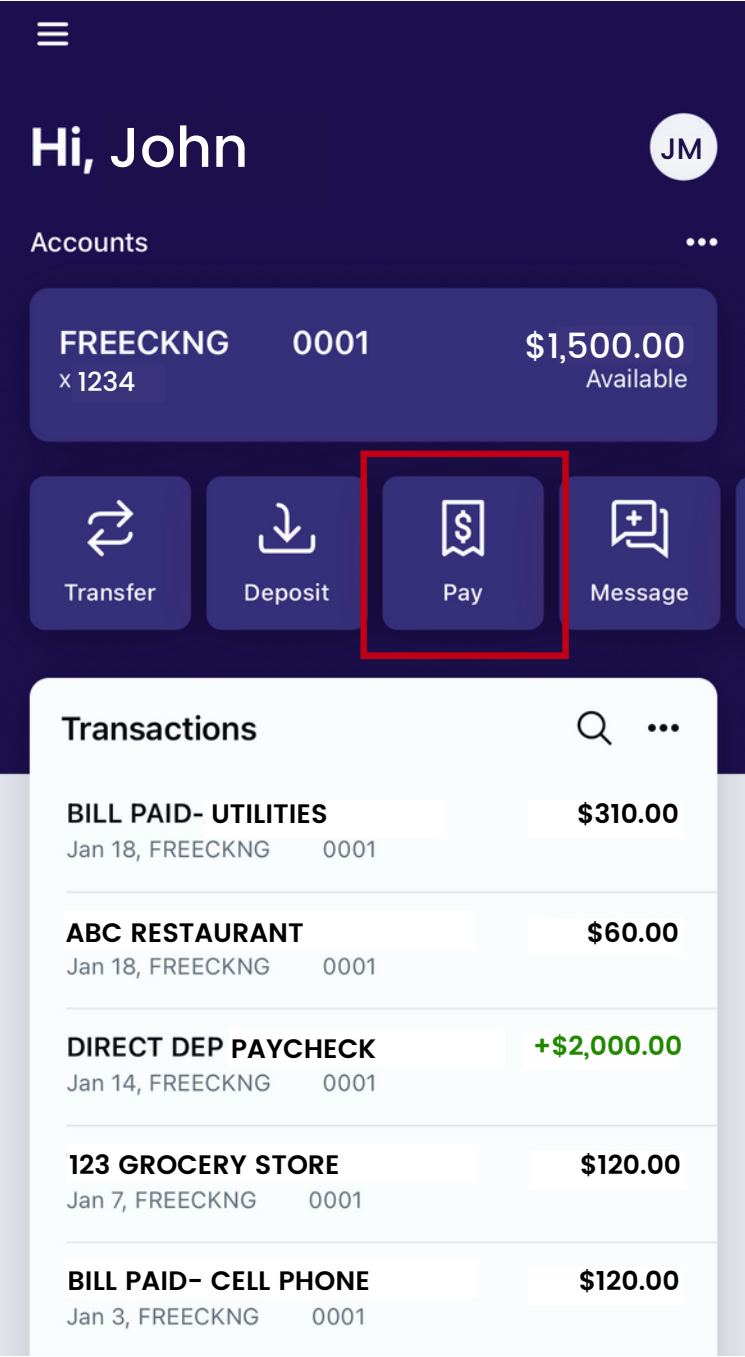


Special Note:

⚡ On the home page, click the icon on the top left of your screen to open the side menu. By selecting "Deposit Checks" you can view recent deposit status and history of electronically deposited items.

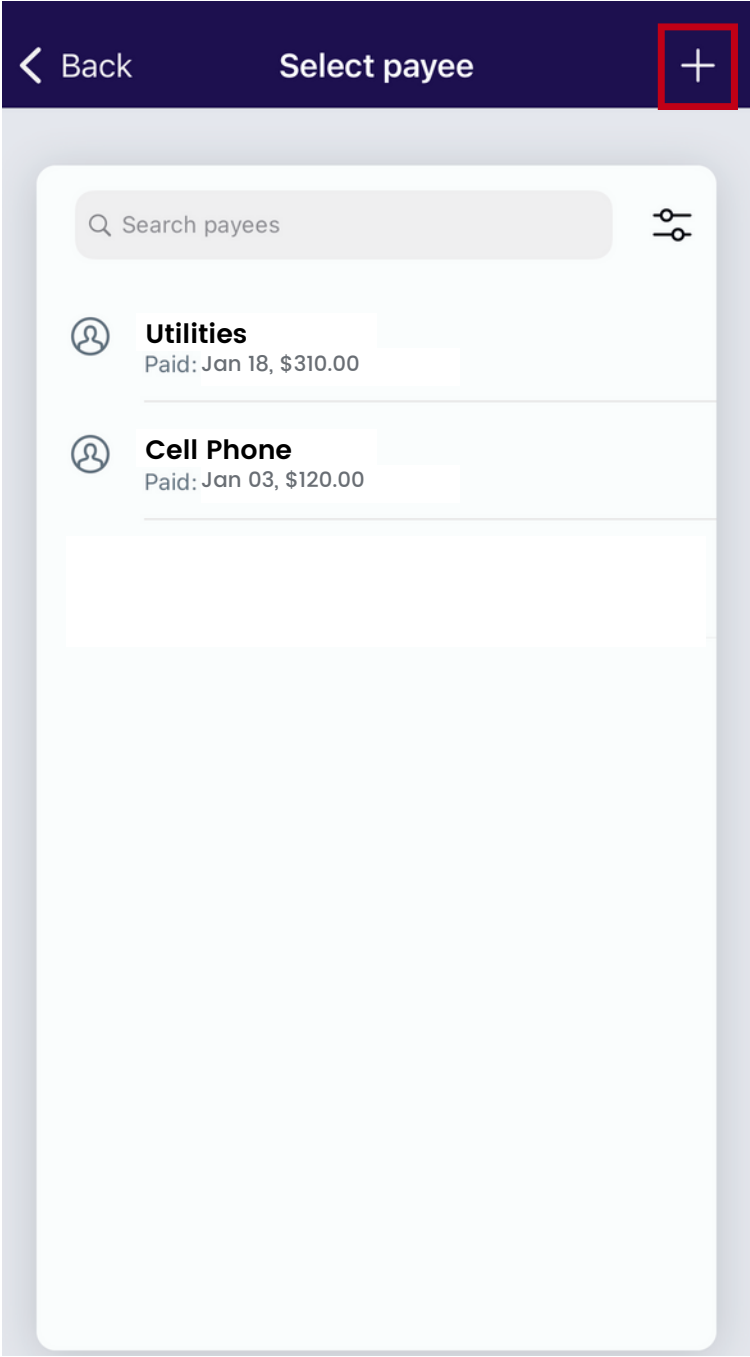
USING BILL PAY SERVICE

Learn how to send money to businesses or other people.



Step 1

★ Once signed into Trustar Bank's Online Banking mobile app, select "Pay".

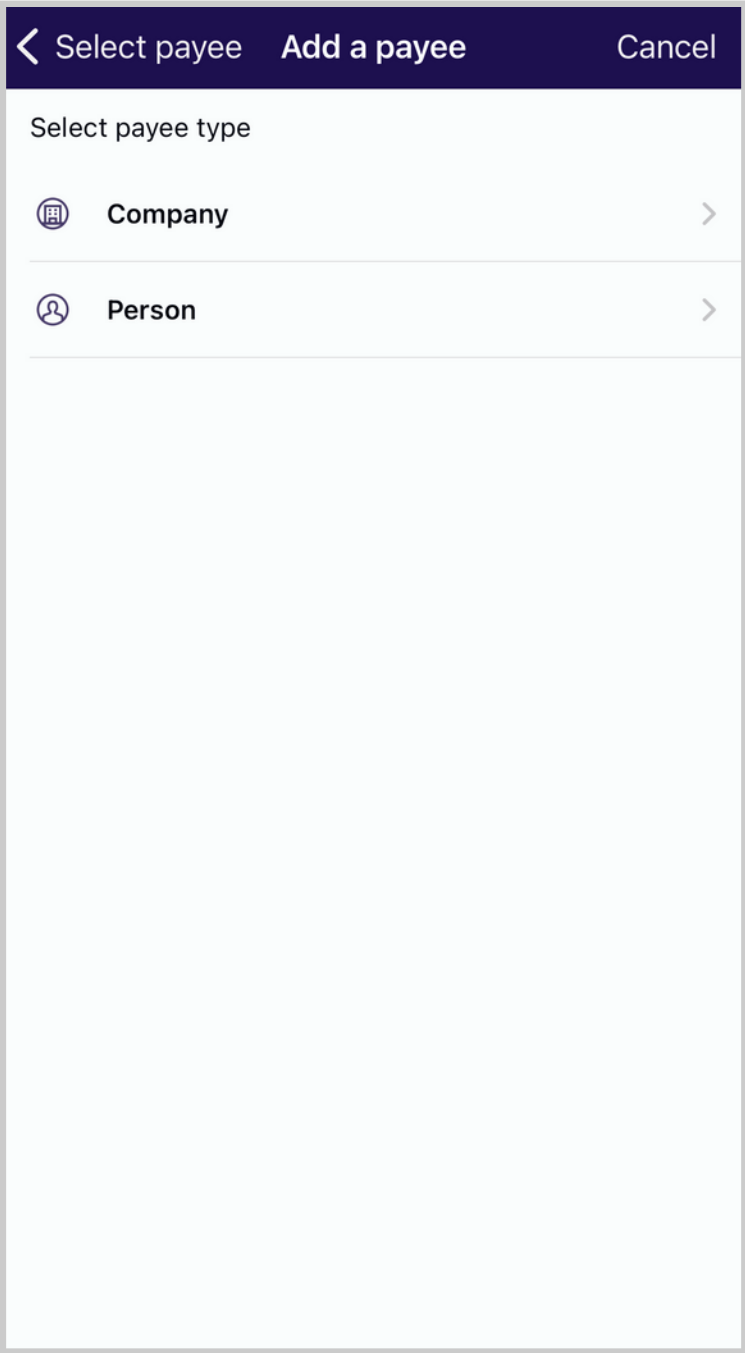


Step 2

★ To add a new payee, select the + sign in the top right corner.

USING BILL PAY SERVICE

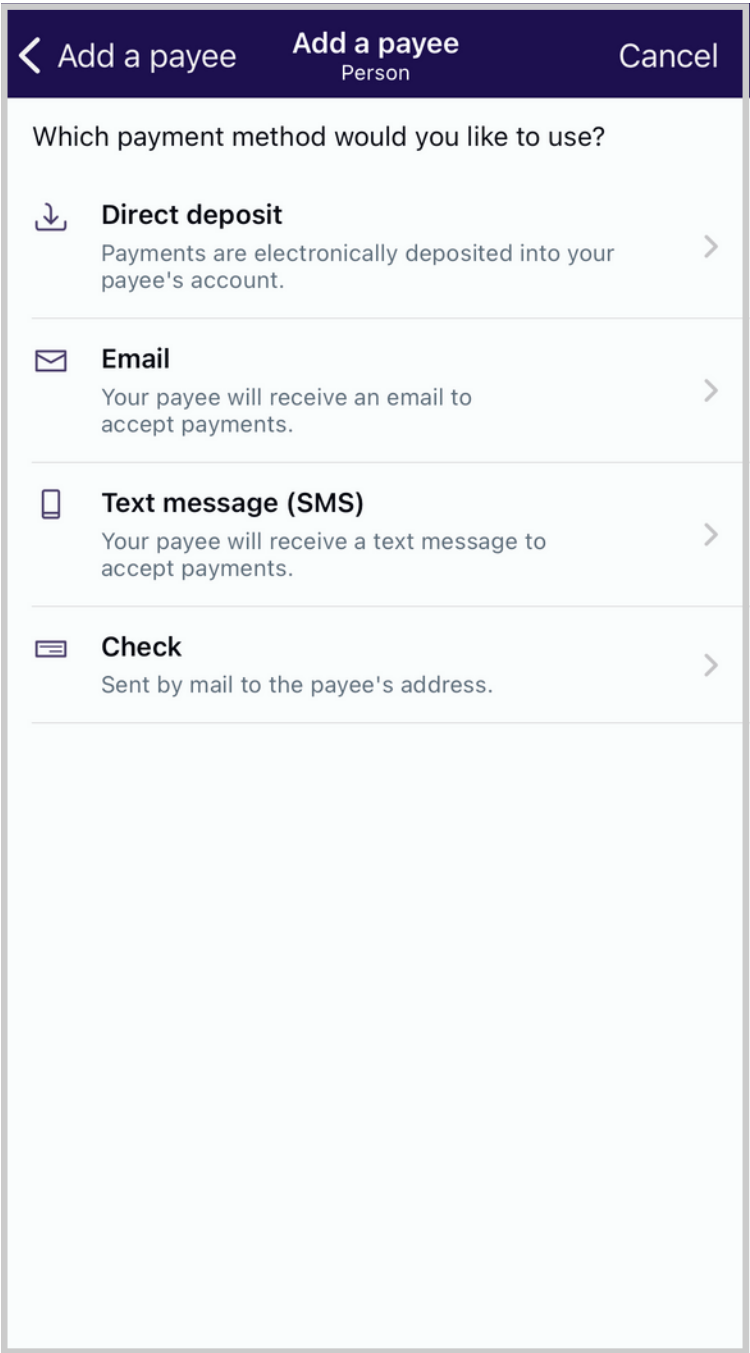
Continued



Step 3

✦ Choose to pay a company or person.

You can use our bill pay service to pay individuals, both as a one-time or recurring payment.



Step 4

✦ Choose how you wish to pay.

Direct deposit will electronically deposit the funds into your payee's account.

Email or text message will send a communication to your payee with information on how to receive the payment.

Check will send a paper check by mail to your payee.

USING BILL PAY SERVICE

Continued

< Back

Add a payee
Company

Cancel

Company

Payee name

Payee nickname (optional)

Phone number

Account number

Name on bill (optional)

Payee address

Street line 1

Street line 2 (optional)

City

State

Zip code

Submit

< Back

Add a payee
Person

Cancel

Direct deposit

First name

Last name

Nickname (optional)

Phone number

Account information

Account type

CheckingSavings

Routing number

Account number

Need help finding routing and account number?

Submit

Step 5

✦ For this example, we will set up a Direct Deposit payee.

Fill out the information for the company or person you wish to pay.

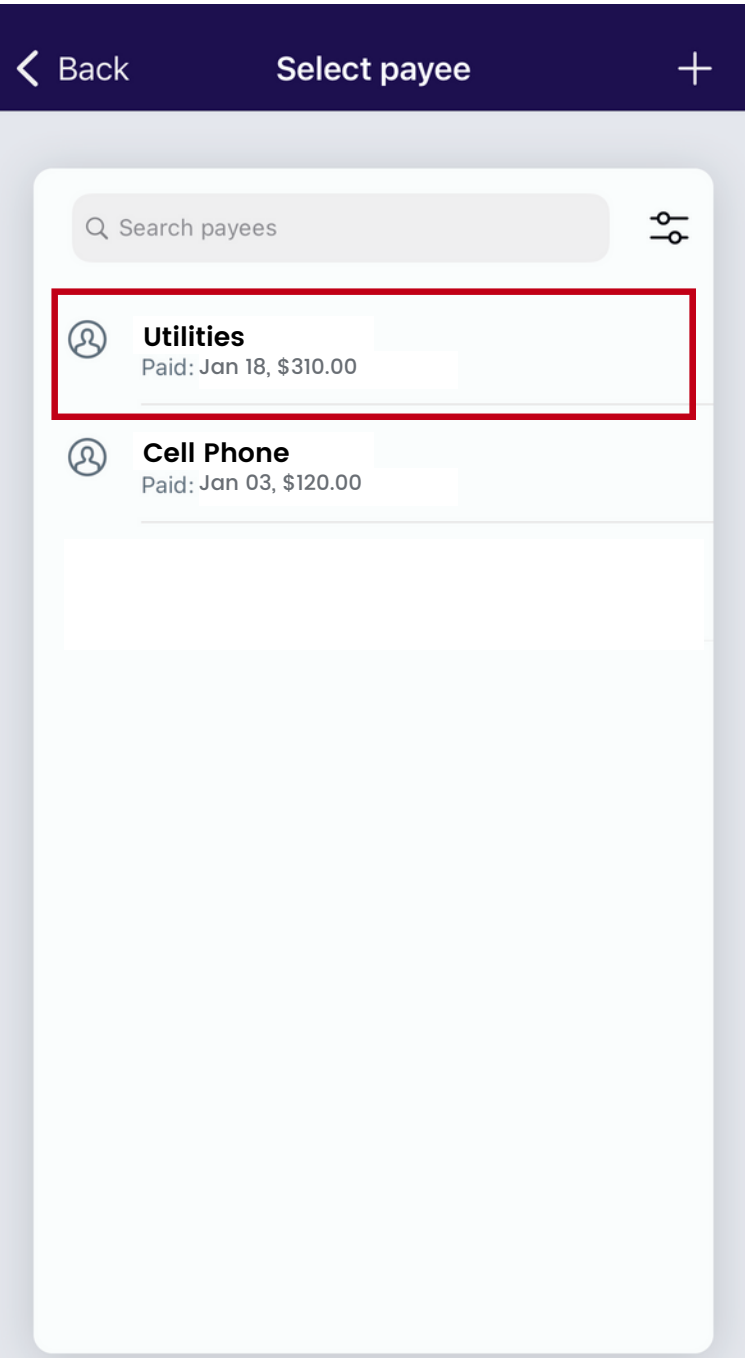
Add the new payee by selecting "Submit" at the bottom of the screen.

Step 6

✦ After adding your payee, go back to the main account screen and select "Pay" again.

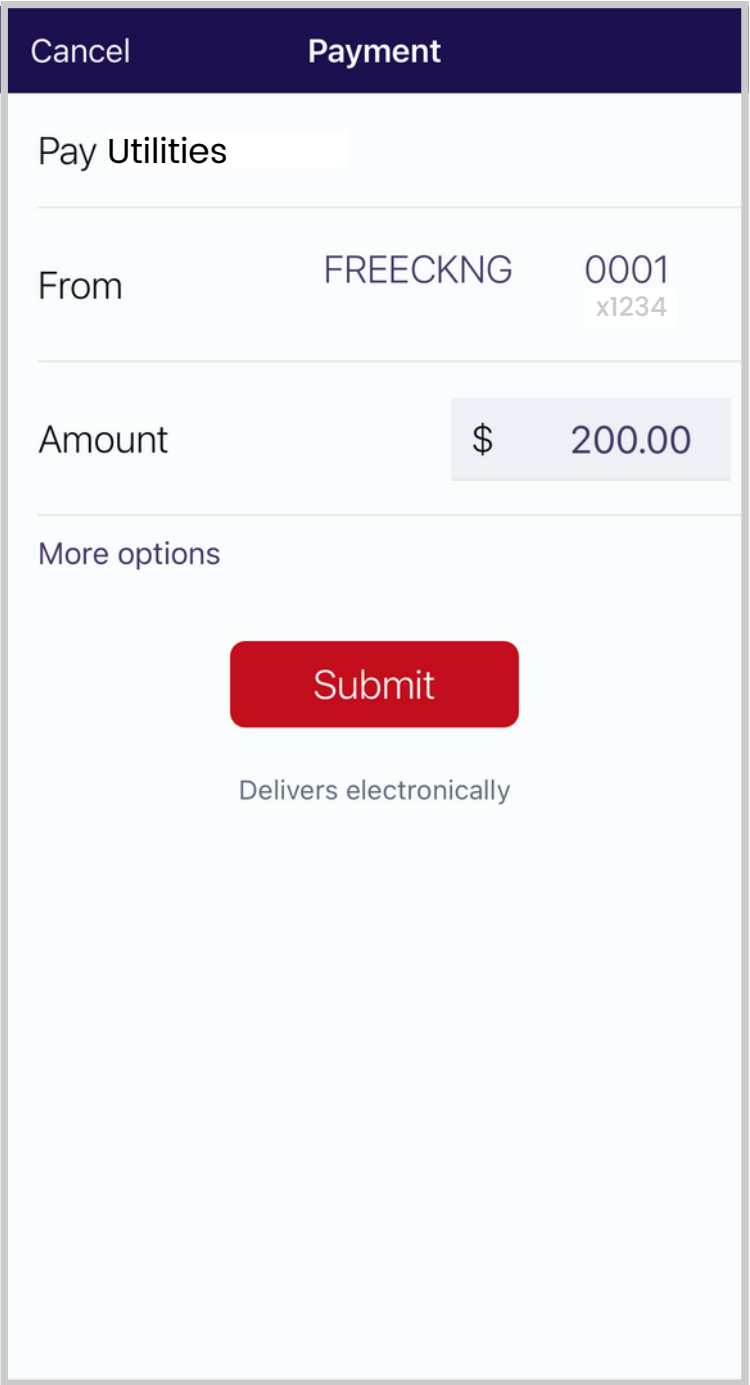
USING BILL PAY SERVICE

Continued



Step 7

✦ Now, your new payee will be listed on your screen. Select the payee you wish to send funds to.

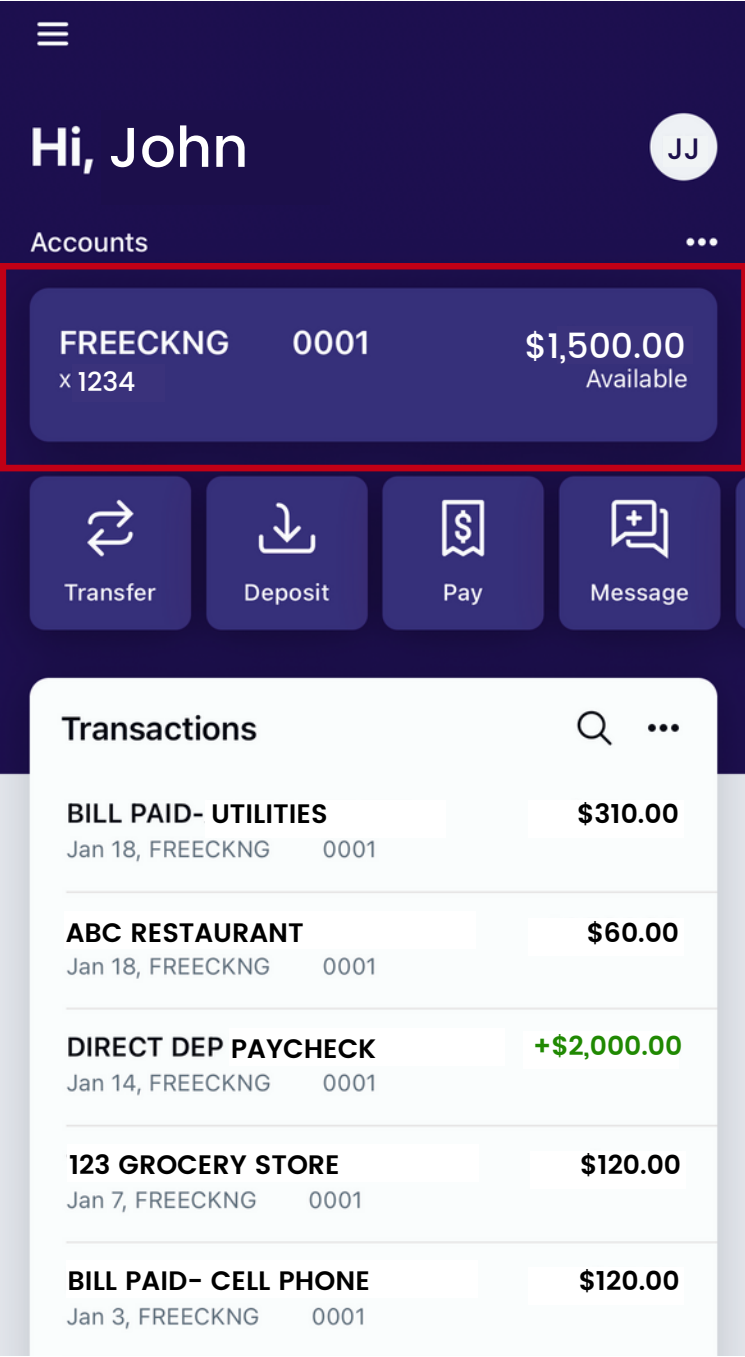


Step 8

✦ Enter the amount you wish to pay and select "Submit". Your payment has now been sent!

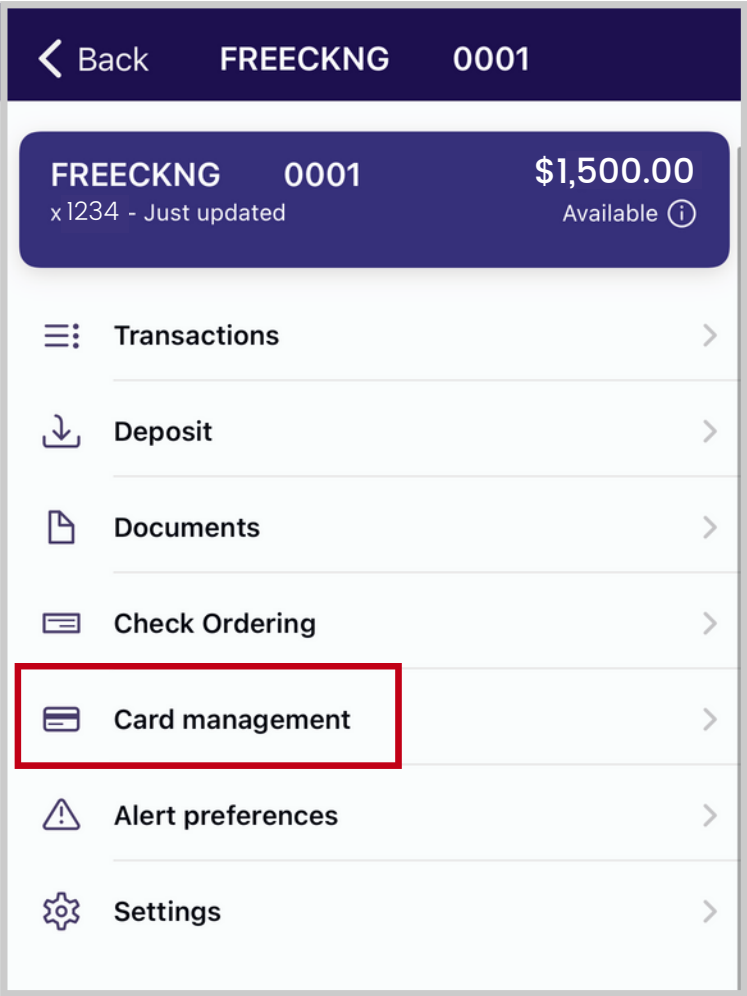
FREEZING YOUR DEBIT CARD

Card lost or stolen? Learn how to freeze your debit card directly in the app.



Step 1

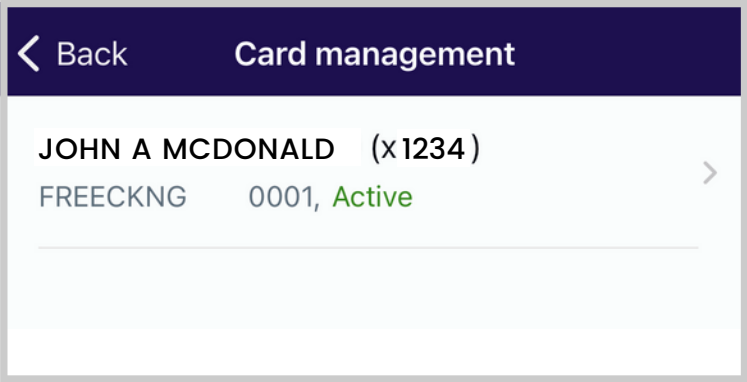
Once signed into Trustar Bank's Online Banking mobile app, click on the account information section.



Step 2

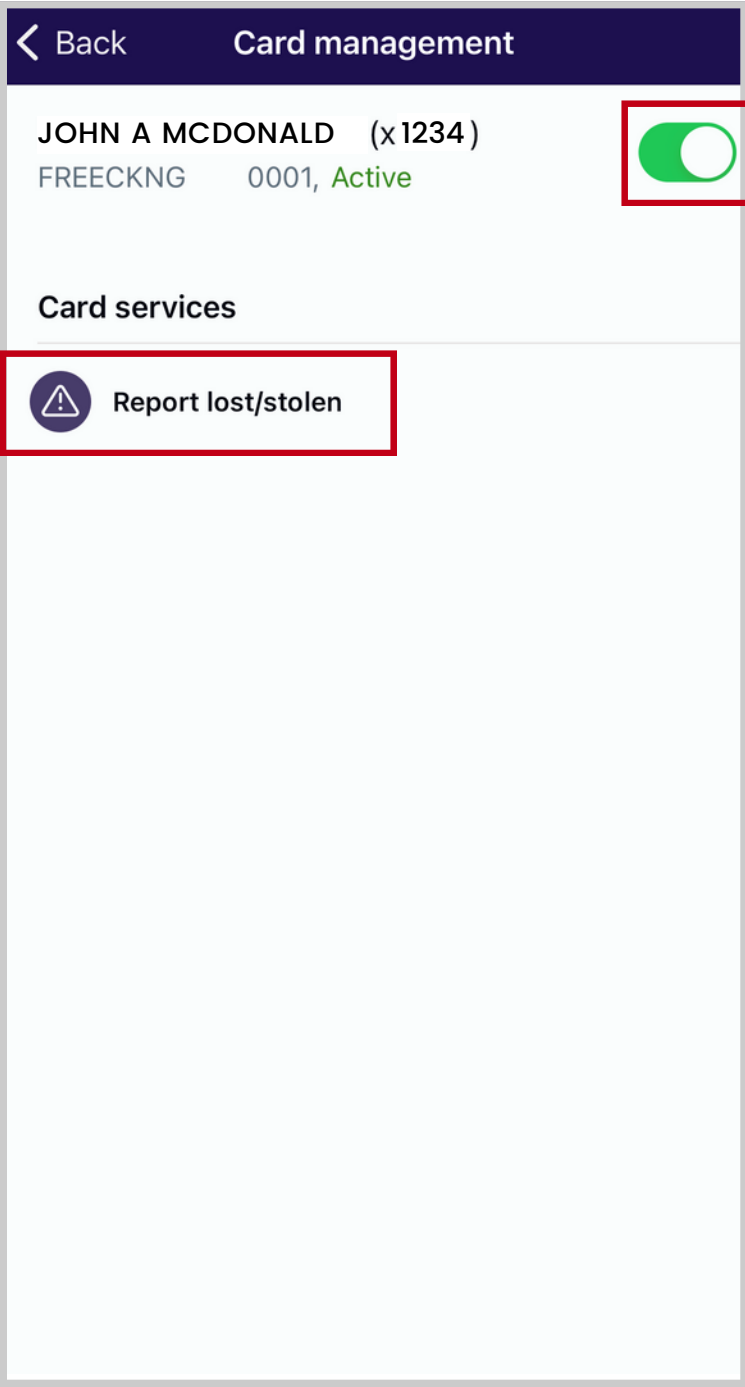
Select "Card management".

On the next screen, select the debit card that you would like to freeze.



FREEZING YOUR DEBIT CARD

Continued

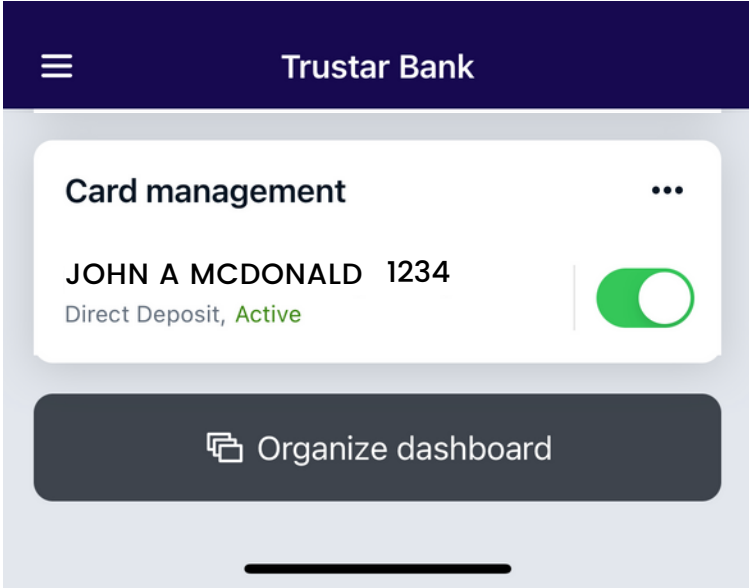


Step 3

✦ From here you can use the toggle switch to lock and unlock your debit card.

This will deny any upcoming transactions. Credits and deposits will still continue.

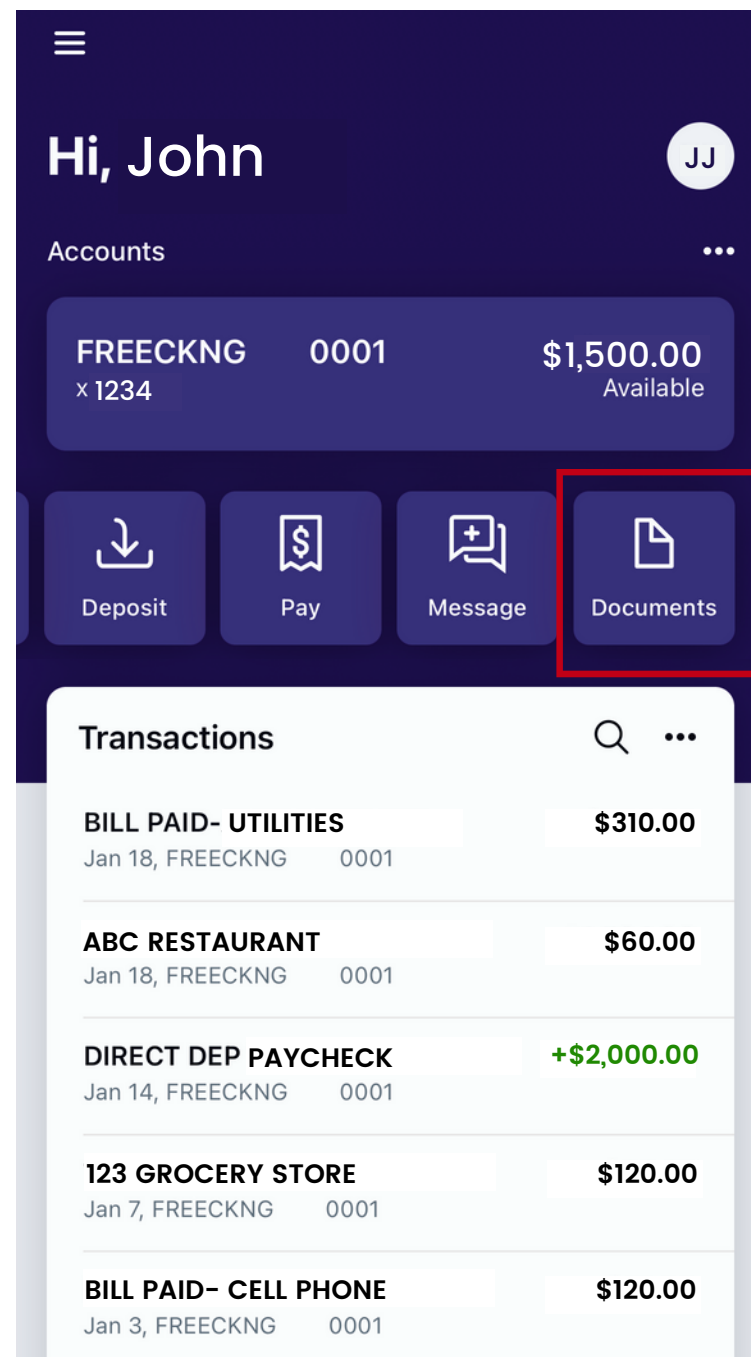
You can also report your card lost or stolen on this screen, which will block any one-time or recurring transactions.



✦ You can also access this toggle by scrolling to the bottom of the account home screen.

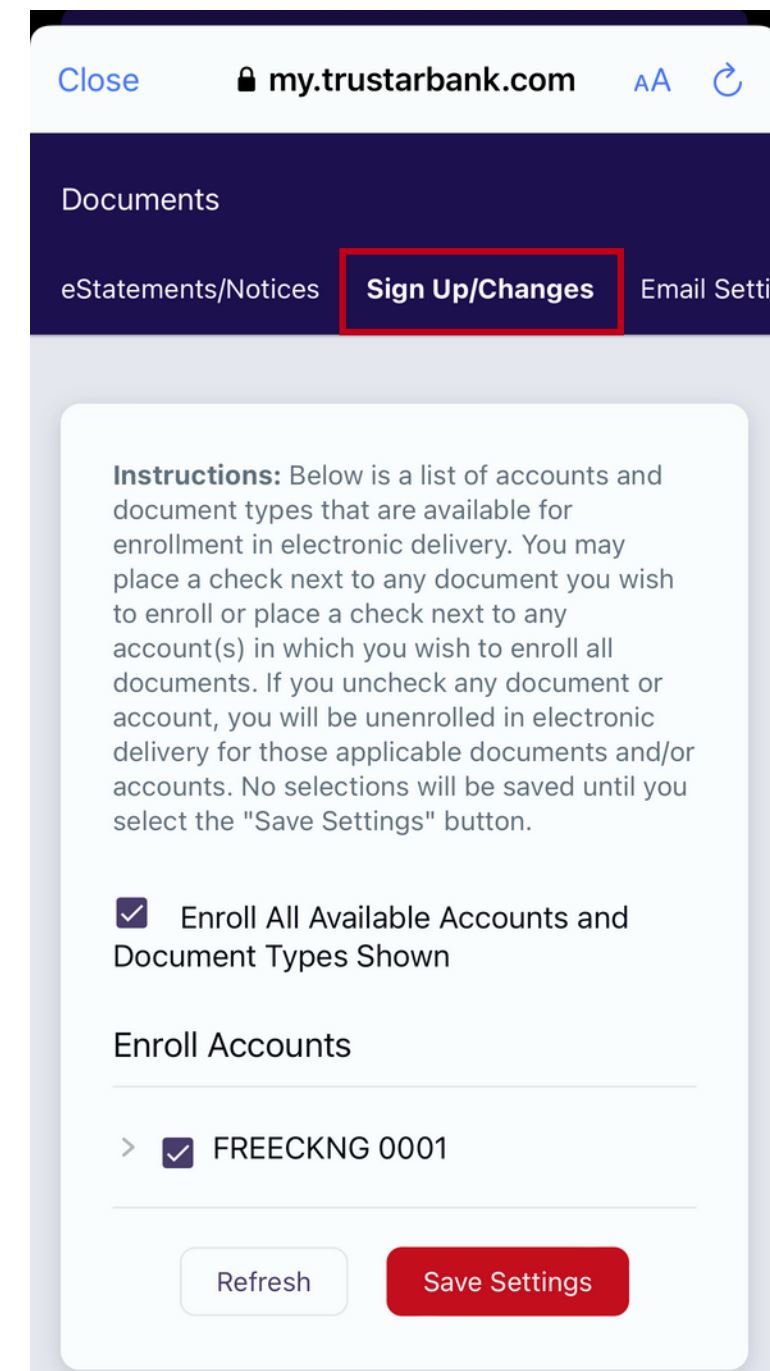
ENROLLING IN E-STATEMENTS

Prefer receiving your statements electronically? Learn how to enroll in e-statements.



Step 1

★ Once signed into Trustar Bank's Online Banking mobile app, select the Documents icon. You may have to scroll to the left to find this option.



Step 2

★ The website www.my.trustarbank.com will appear in a pop-up.

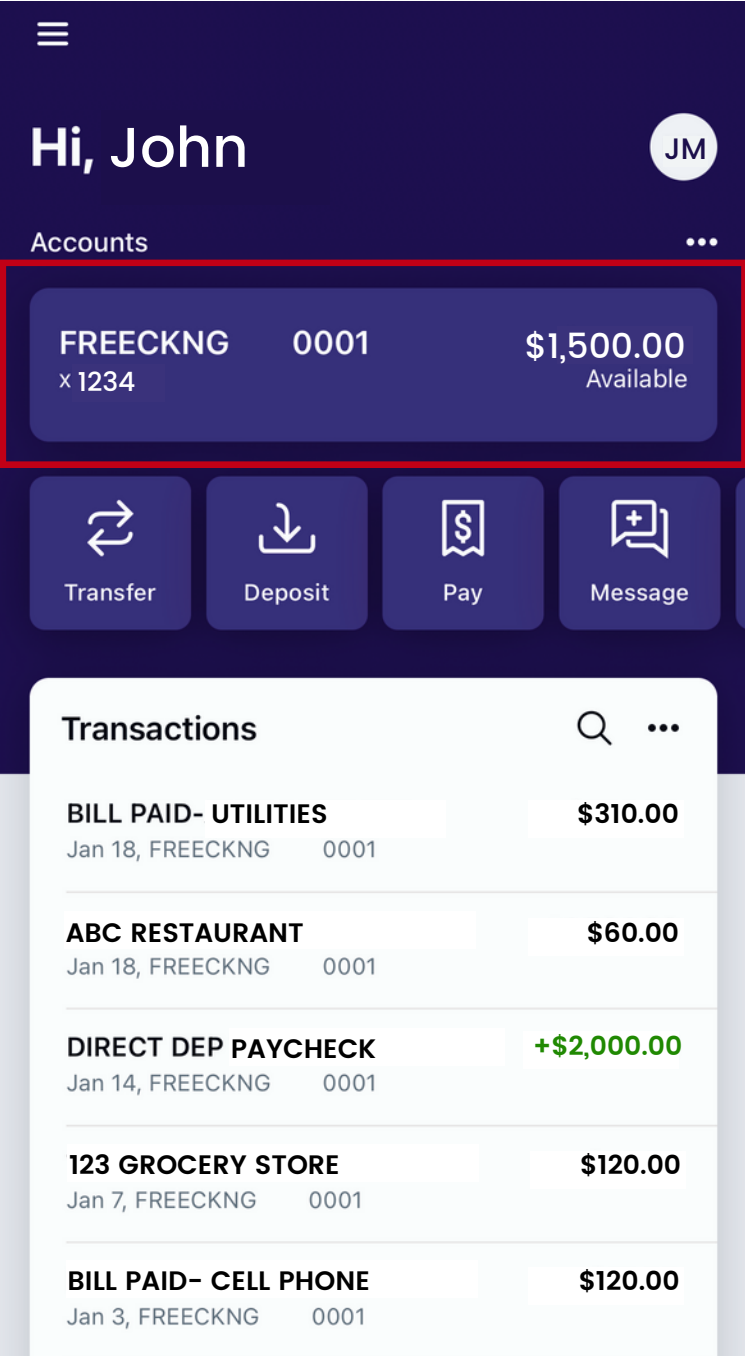
Select the "Sign Up/Changes" tab.

Here you can enroll in e-statements by placing a checkmark next to any account you wish to enroll.

Select "Save Settings" to save your preferences.

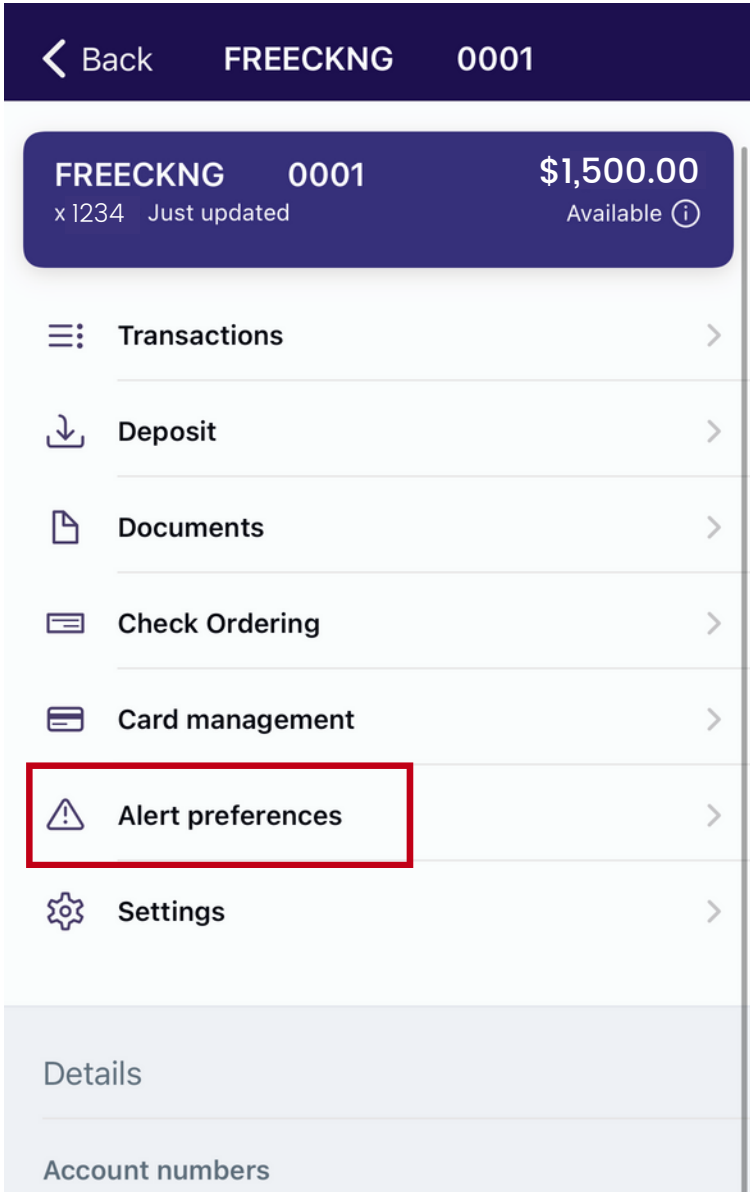
SETTING ALERT PREFERENCES

Want to stay updated on your account? Learn how to set your alert preferences.



Step 1

Once signed into Trustar Bank's Online Banking mobile app, click on the account information section.

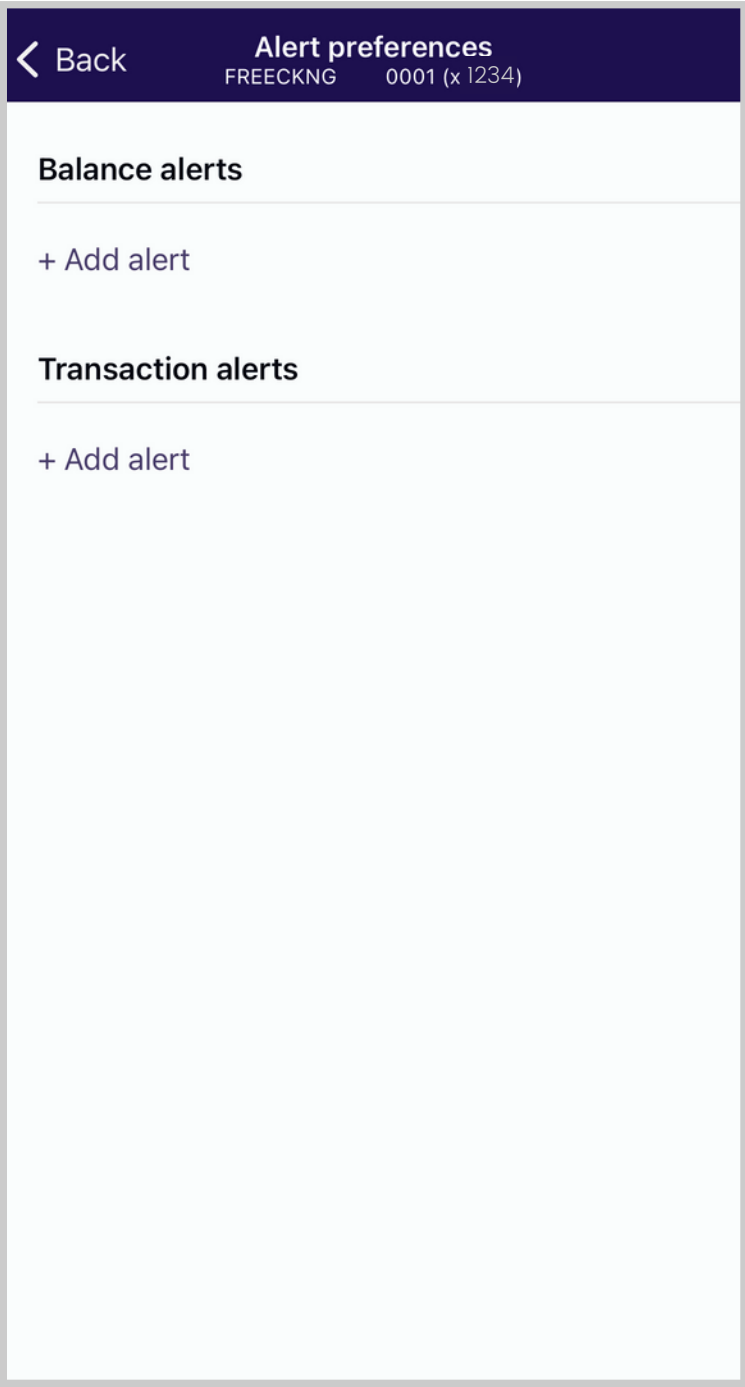


Step 2

Select "Alert Preferences".

SETTING ALERT PREFERENCES

Continued

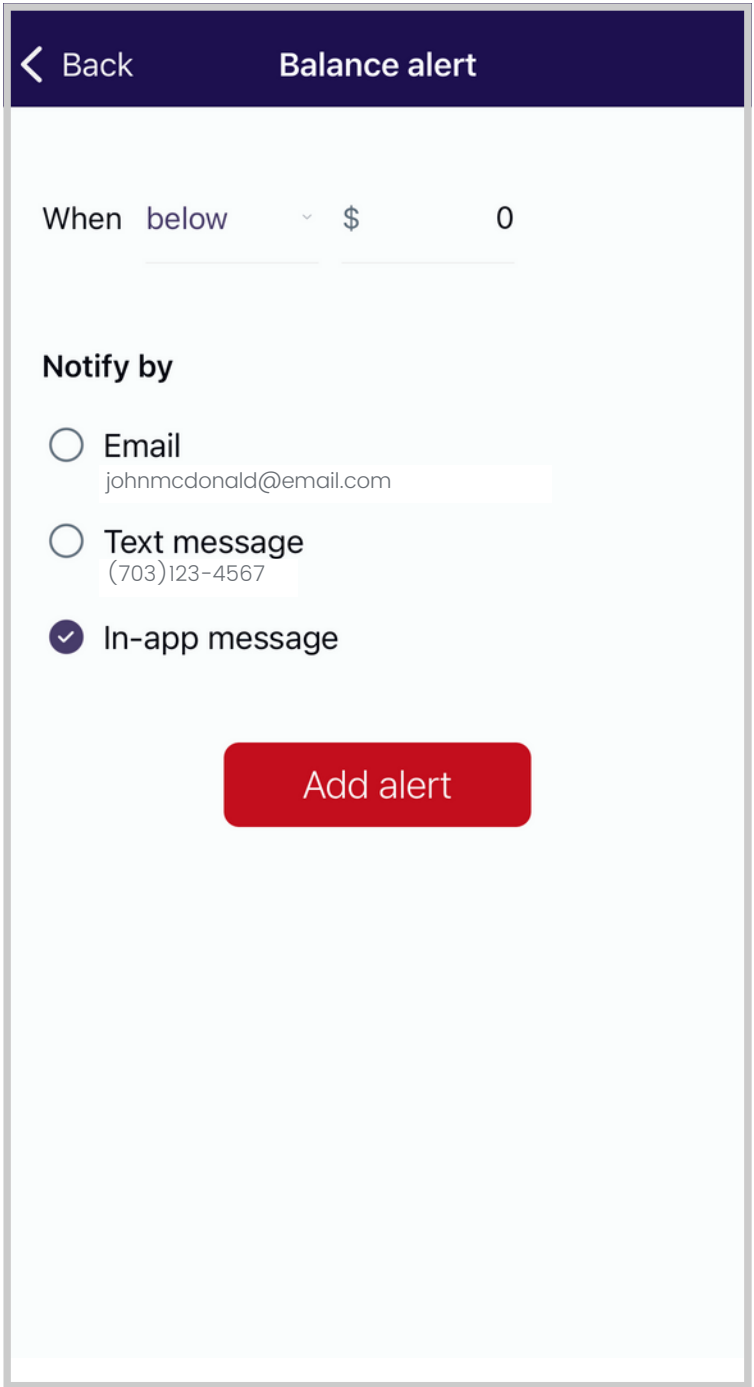


Step 3



From here you can set different alerts to keep you up to date on your account, such as when your account goes below a certain balance or when a large transaction takes place.

Select "+ Add Alert" to start.



Step 4

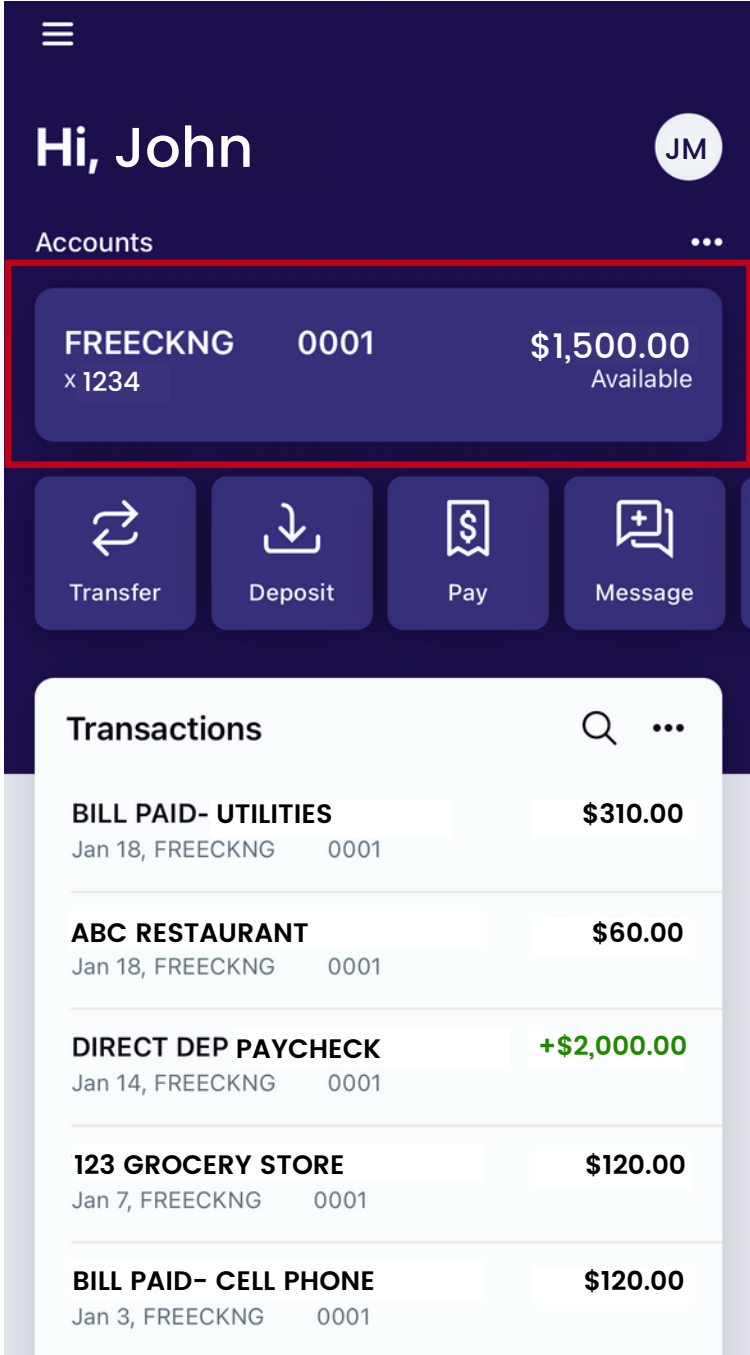


Choose the details of your alert notification and how you would like to be notified.

Select "Add alert" to save your new alert.

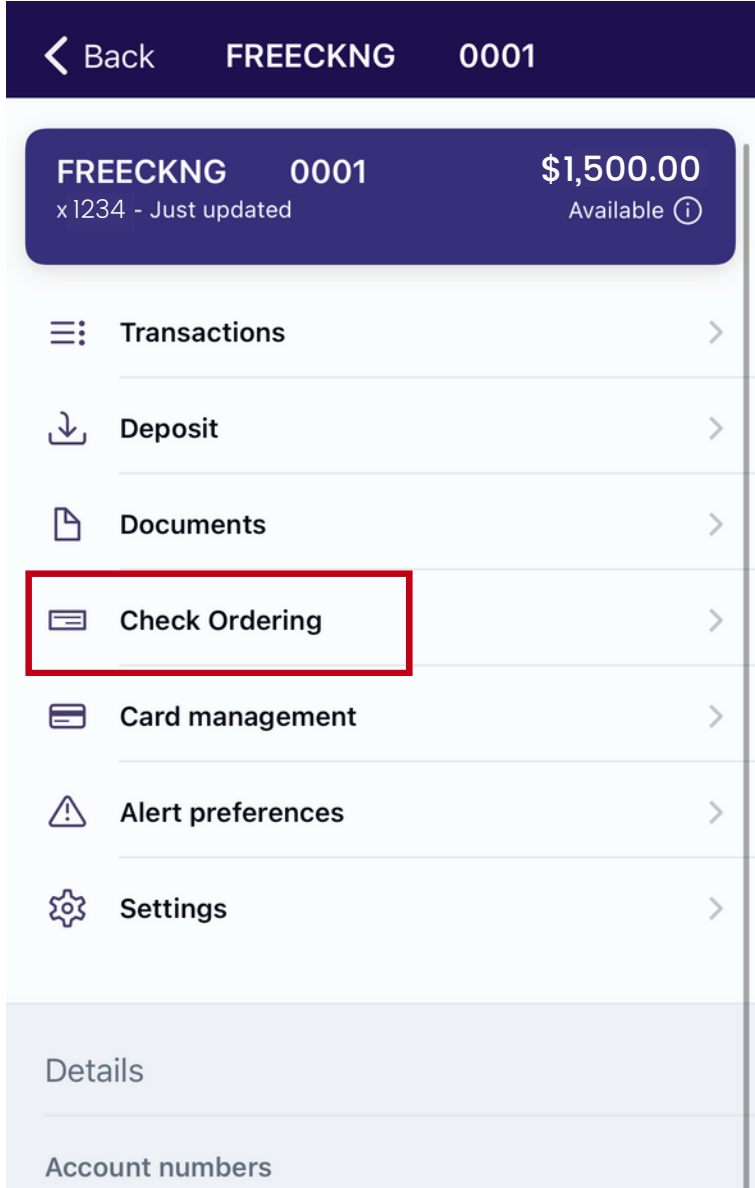
ORDERING CHECKS

Out of checks? Learn how to order more!



Step 1

Once signed into Trustar Bank's Online Banking mobile app, click on the account information section.

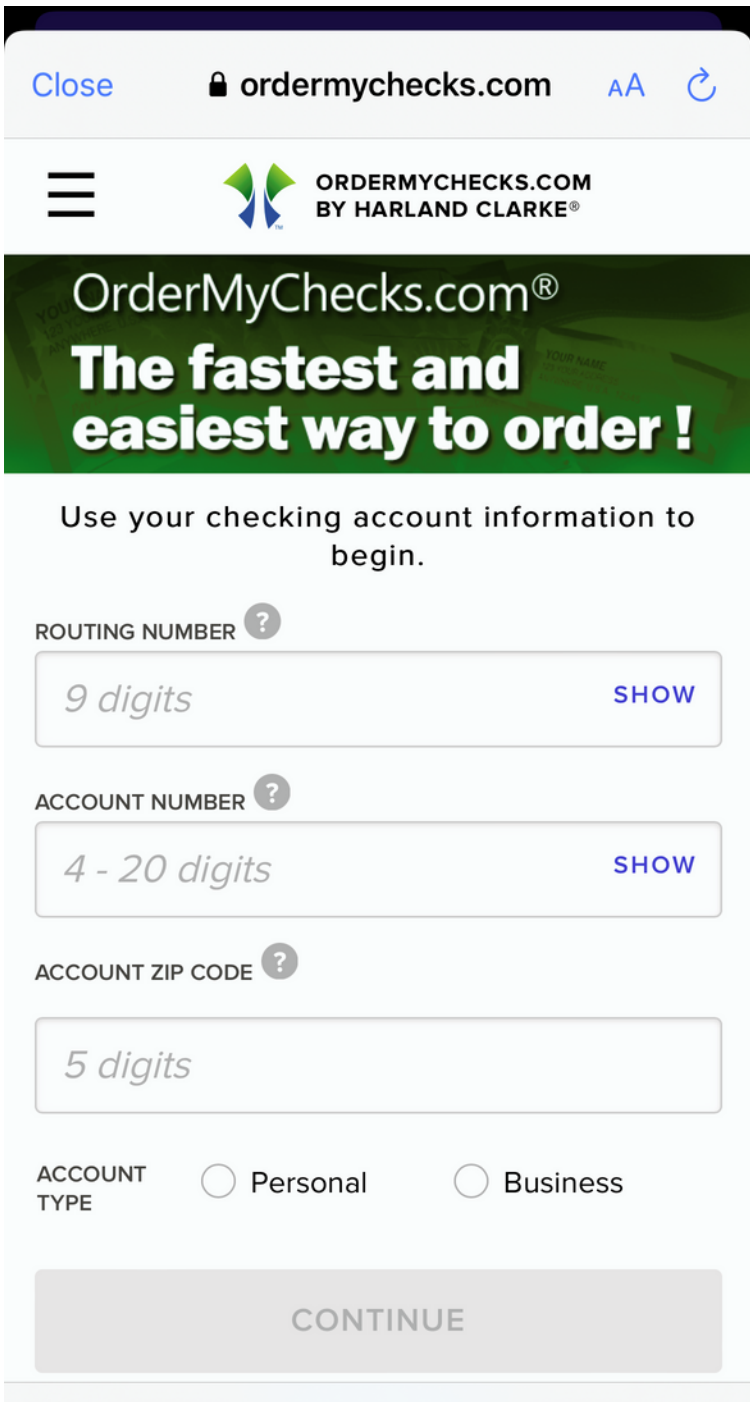


Step 2

Select "Check ordering". This will take you to an external website, www.ordermychecks.com.

ORDERING CHECKS

Continued



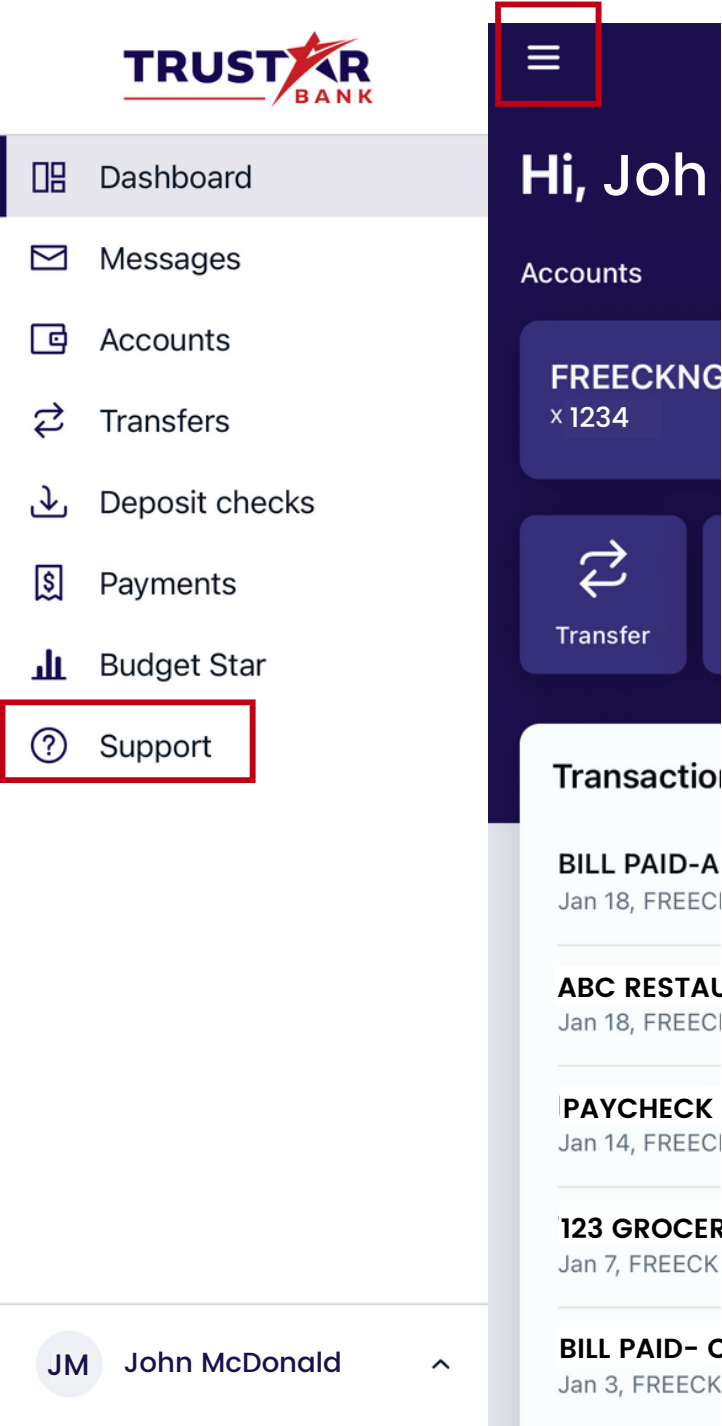
The screenshot shows the mobile app interface for OrderMyChecks.com. At the top, there's a navigation bar with a 'Close' button, the URL 'ordermychecks.com', and a refresh icon. Below this is a header with a hamburger menu icon and the text 'ORDERMYCHECKS.COM BY HARLAND CLARKE®'. A green banner below the header reads 'OrderMyChecks.com® The fastest and easiest way to order!'. The main content area has the instruction 'Use your checking account information to begin.' followed by three input fields: 'ROUTING NUMBER' (with a help icon and '9 digits' placeholder), 'ACCOUNT NUMBER' (with a help icon and '4 - 20 digits' placeholder), and 'ACCOUNT ZIP CODE' (with a help icon and '5 digits' placeholder). Each field has a 'SHOW' button. At the bottom, there's an 'ACCOUNT TYPE' section with radio buttons for 'Personal' and 'Business'. A large grey 'CONTINUE' button is at the very bottom.

Step 3

✦ Go through the form and fill out the requested information and click submit. Your checks will be mailed to you in about two weeks.

SUPPORT AND MESSAGES

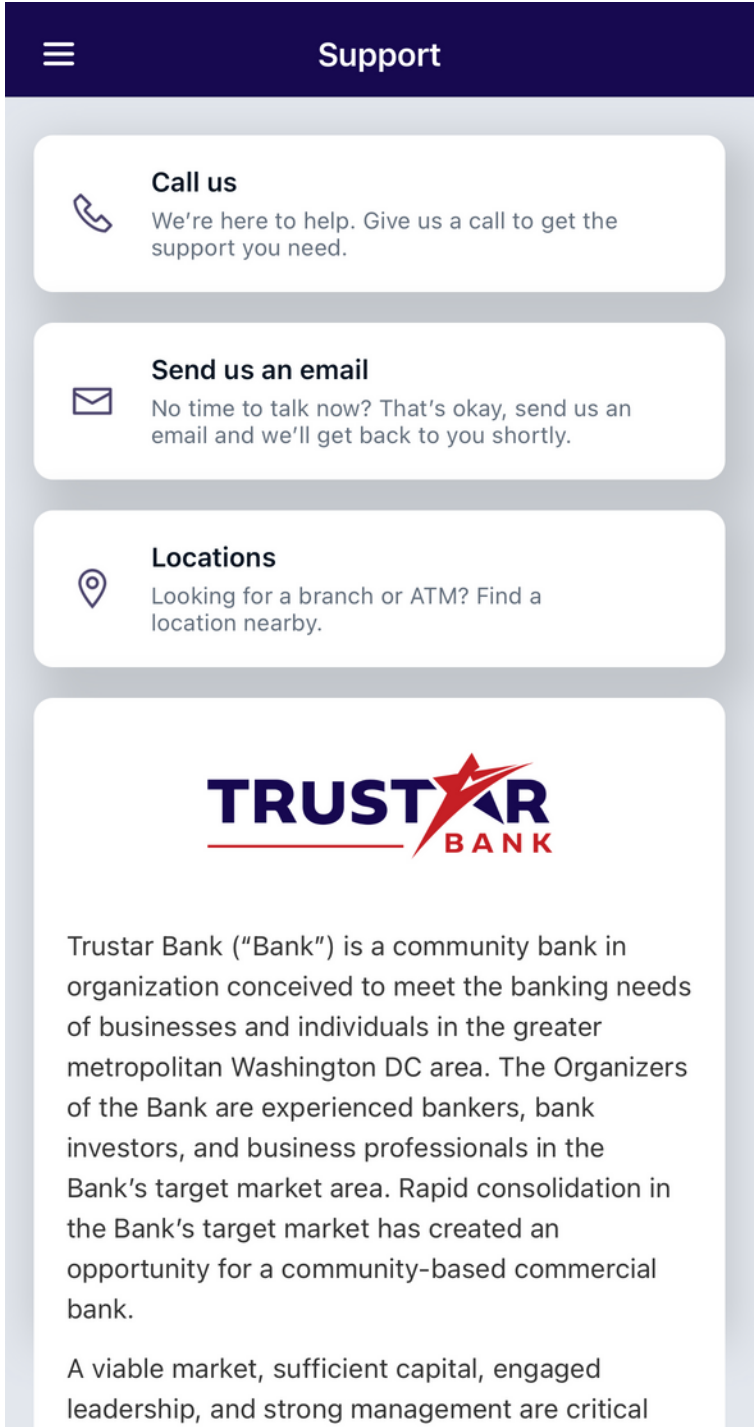
Need help using our app? Have a question about your account? You can reach one of representatives quickly and easily.



Step 1

★ On the home page, click the icon on the top left of your screen to open the side menu.

Select "Support".

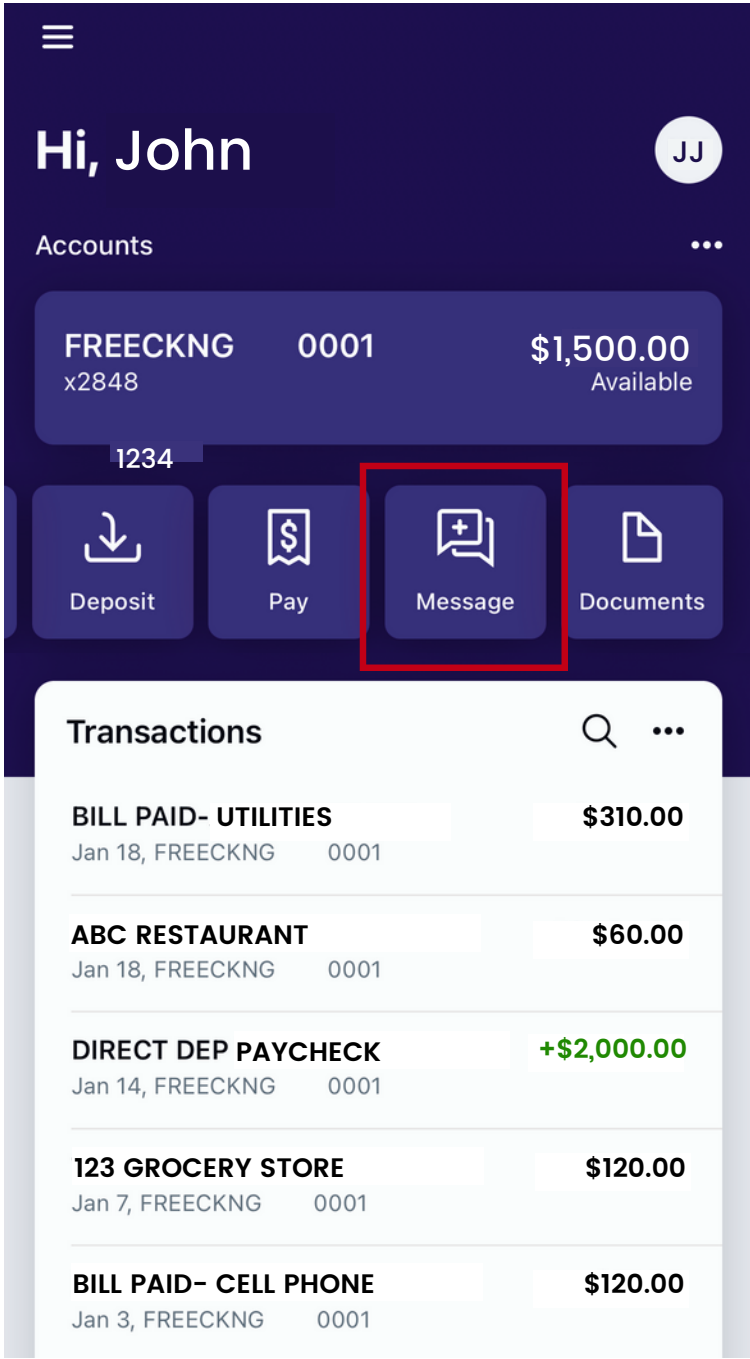



Step 2

★ Here you call call us, send us an email, or view all of our locations to visit us in person.

SUPPORT AND MESSAGES

Continued



 You can also send us a message by selecting the "Message" button on your home screen.

This will open an email, where you can submit your inquiry.