BANC OF CALIFORNIA

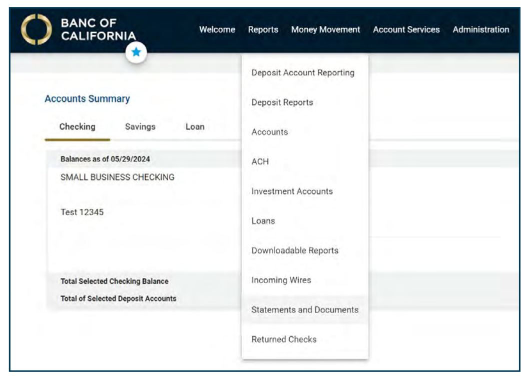
USER GUIDE:

STATEMENTS & ALERTS

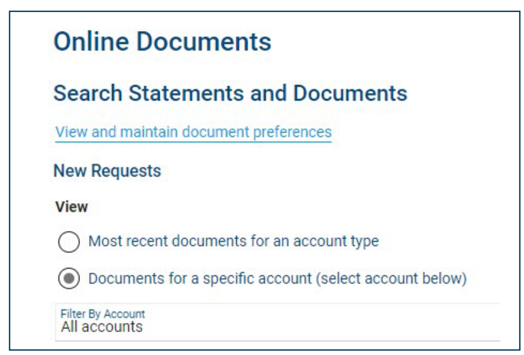
User Guide: Statements & Alerts

Enroll in Online Statements.

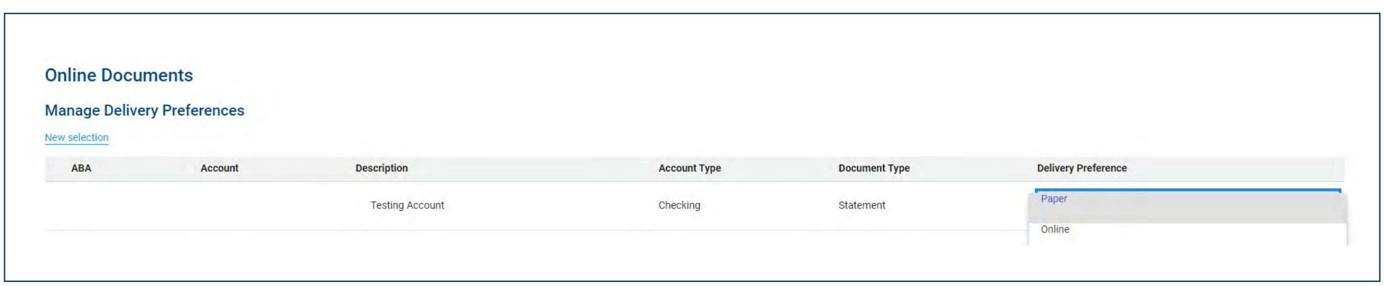
1 To enroll in online statements, hover over **Reports** and click **Statements and Documents**.



2 On the next screen, click **View and maintain document preferences**.



3 Change the delivery preference to **Online** for the notice or statement and click **Continue**.



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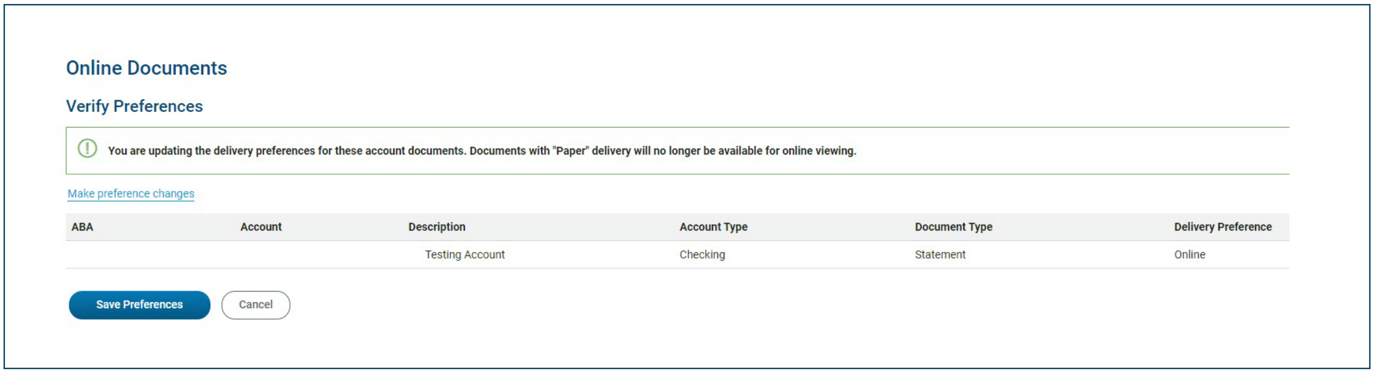
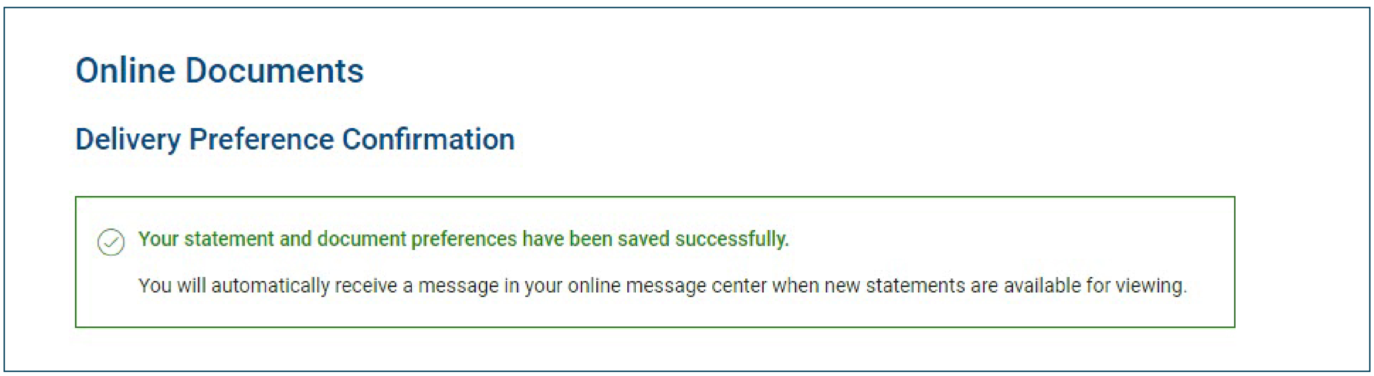
CALIFORNIA

(cont'd) Enroll in Online Statements.

4 Review the service agreement and click **I Agree**, then verify the delivery preference change and click **Save Preferences**. A confirmation message will appear. You'll receive your online statements immediately upon updating your delivery preferences.





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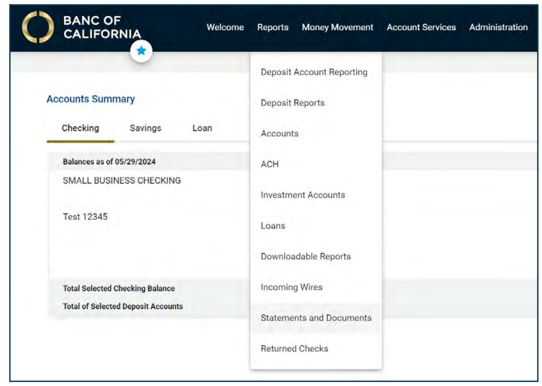
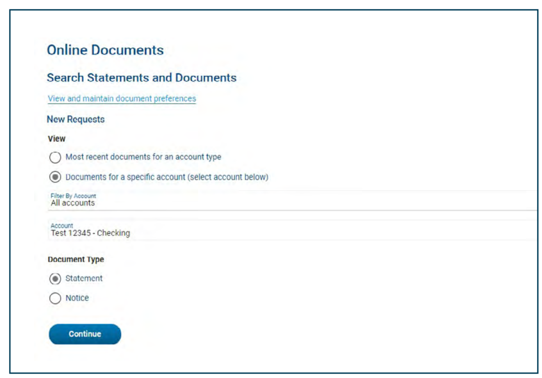
View & Download Statements.

1 Hover over **Reports** and select **Statements and Documents**.

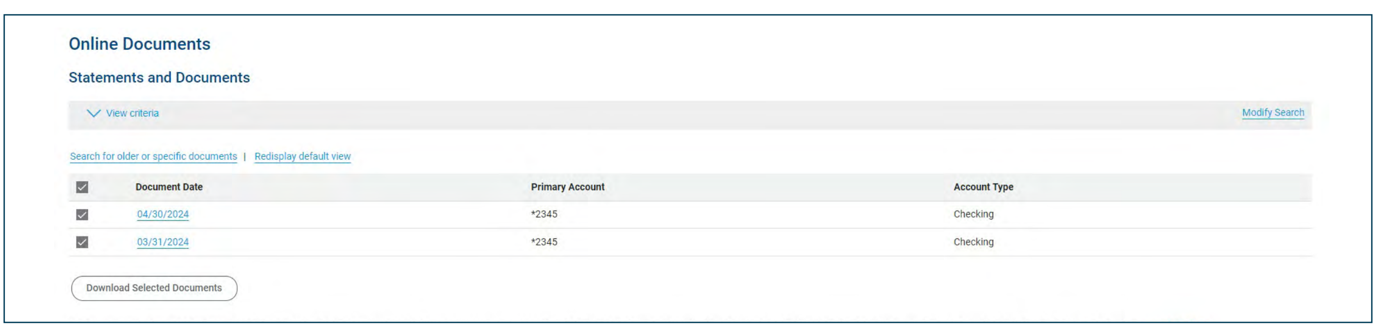


2 Under **View**, select: Most recent documents for an account type > Checking accounts or Savings accounts or Documents for a specific account (select account below) > Filter By Account > Account.

3 Then select **Statement** and click **Continue**.

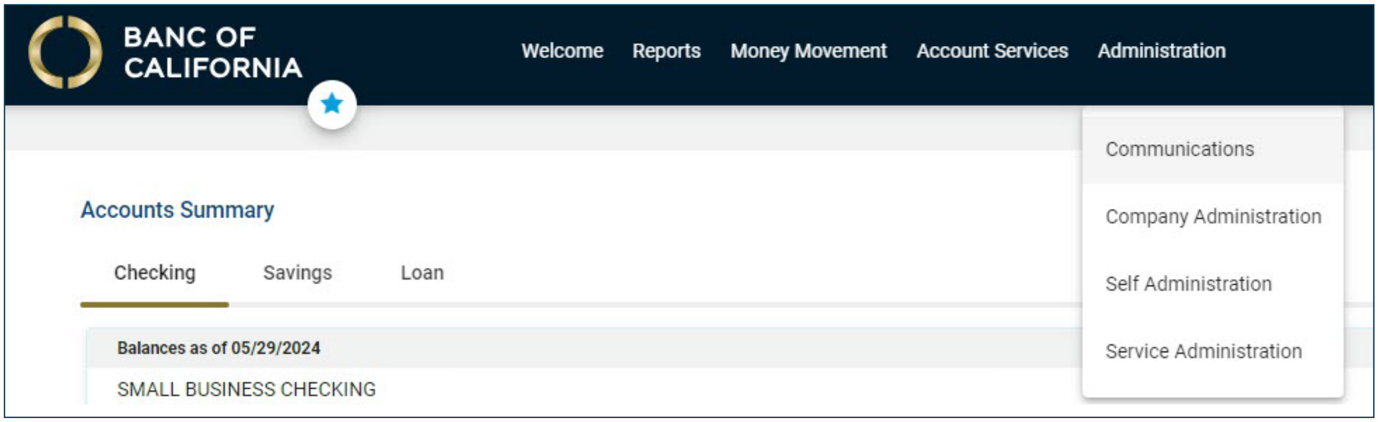


4 Click on a statement date to view a specific statement. You can print or download the statement from the new window. You can also download one or more statements by selecting the box beside the desired statement(s) and then click Download Selected Statements. A PDF (for one statement) or zip file (for multiple statements) will download.

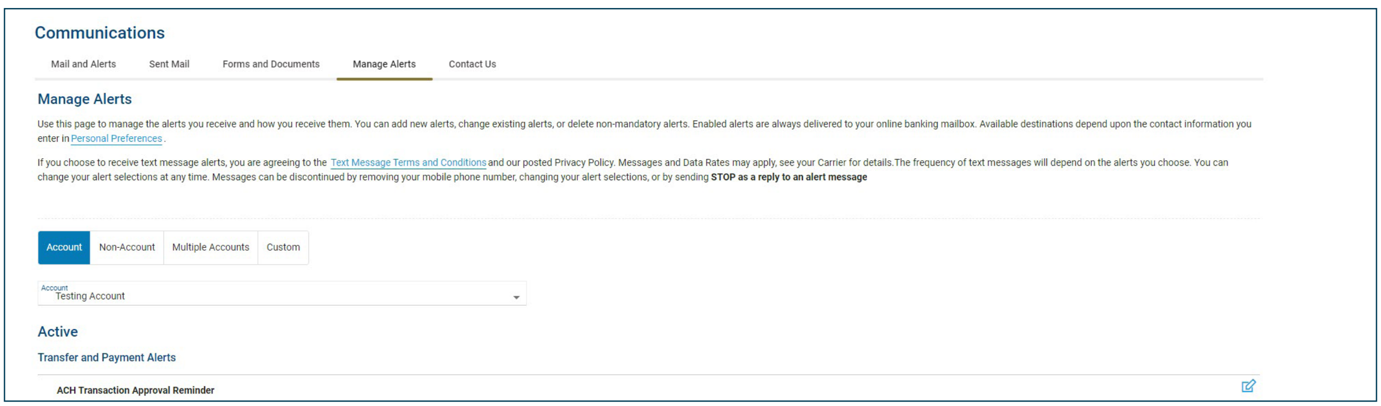


Add Alerts.

1 To add alerts, hover over **Administration** and select **Communications**.

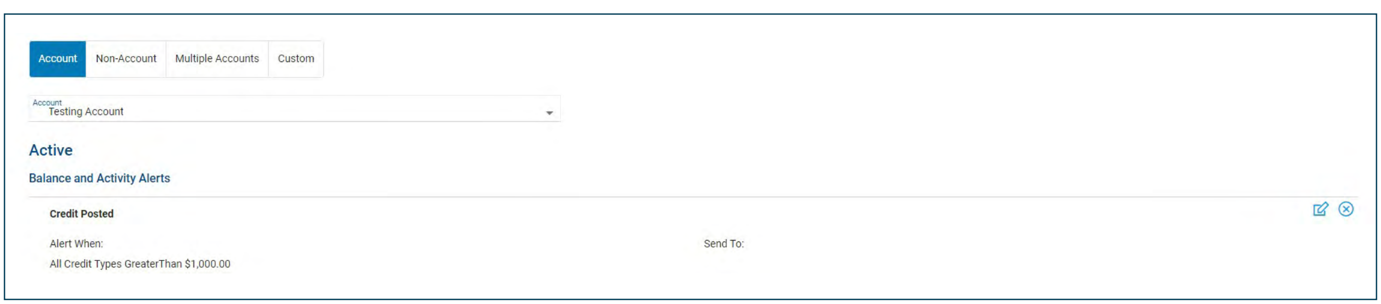


2 Select **Manage Alerts**, then select alert type: Account, Non-Account, Multiple Accounts or Custom.



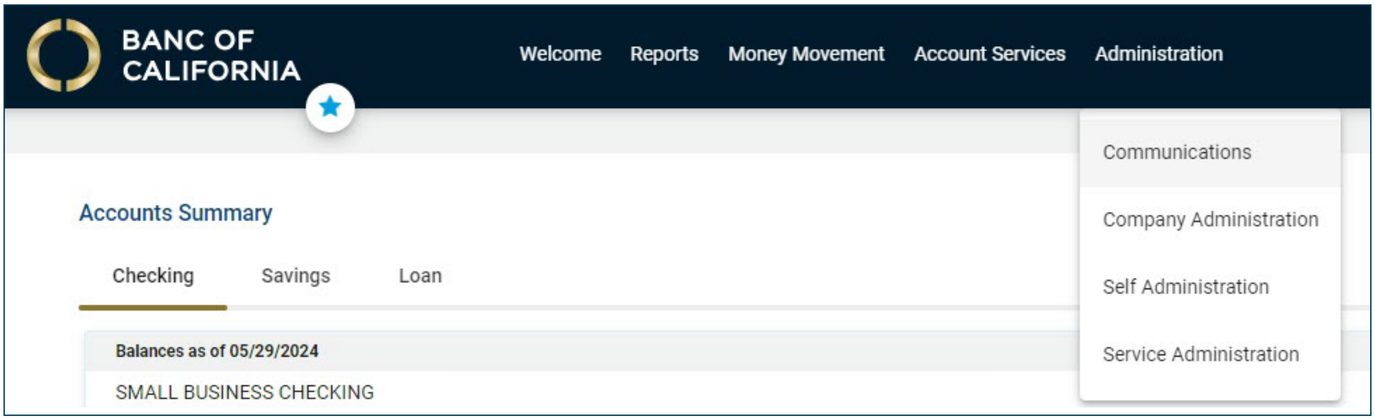
3 Scroll down to view the different alert categories and select the **(+)** to add any alerts you want to enable for that account. Enter any required information, select your email and click **Add**. Once added, the alert will appear under the **Active** section.

4 To edit or delete an alert, select either the edit icon or the X icon on the right side.

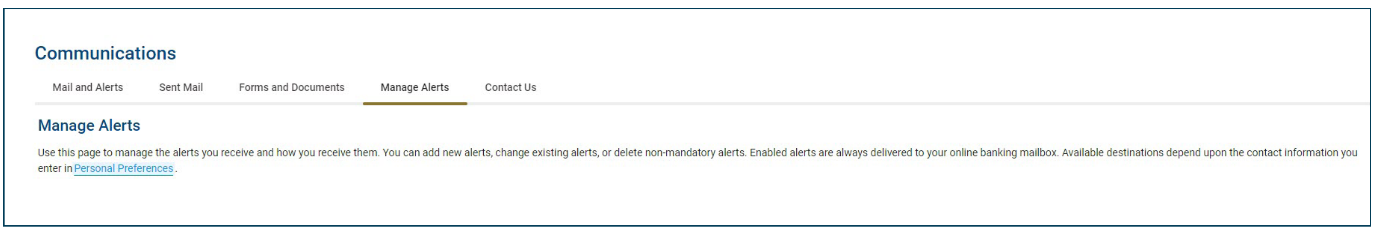


Manage Contact Info.

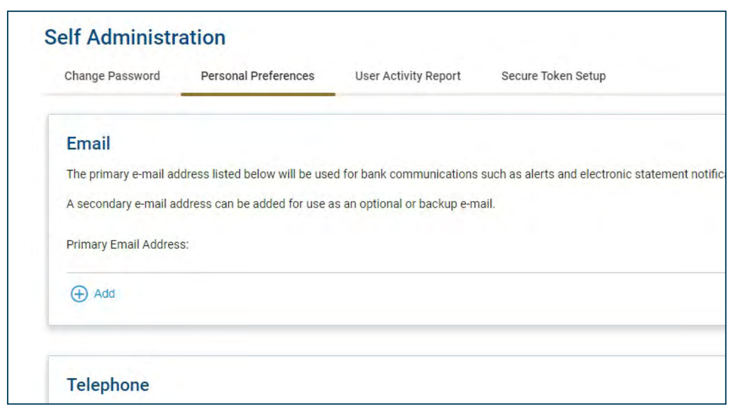
1 To manage contact info, hover over **Administration** and select **Communications**.



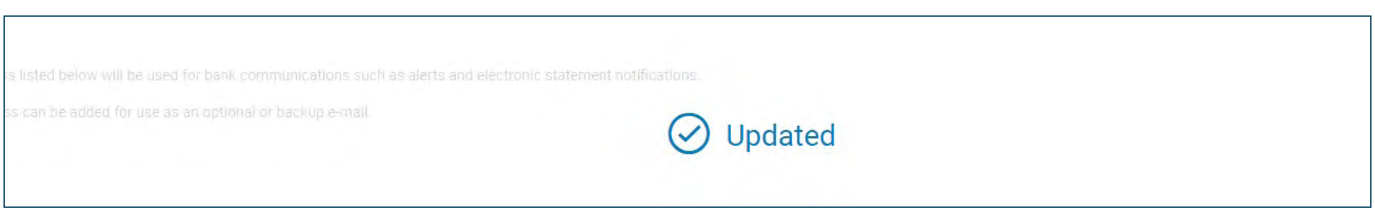
2 Select **Manage Alerts**, then click **Personal Preferences** link below **Manage Alerts**.



3 Click **Add** under Email or Telephone.

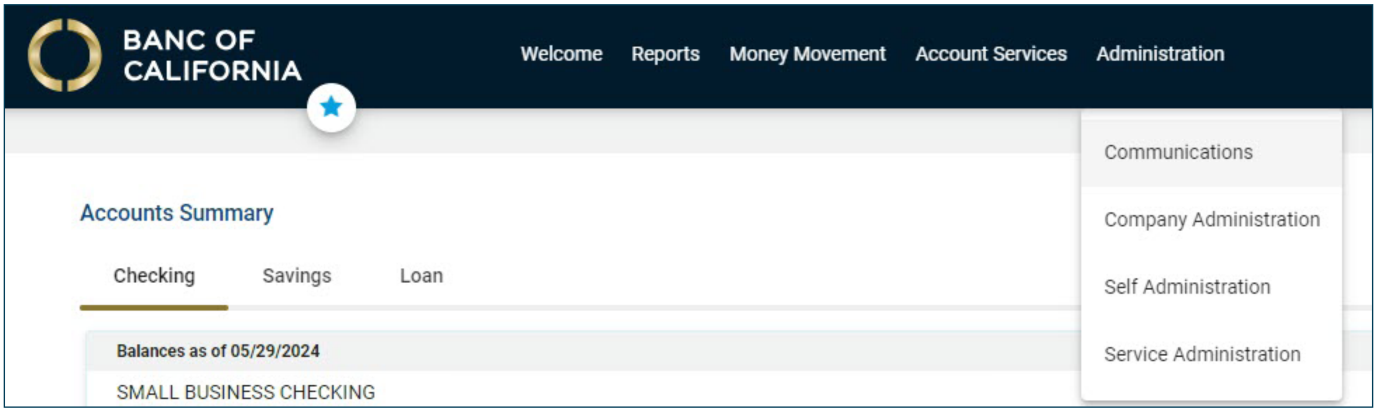


4 Enter the information and click **Update**. To edit existing contact info, select the edit icon. Make changes to the information and click **Update**. A confirmation will appear.



View Messages and Alerts.

1 Hover over **Administration** and select **Communications**.



2 Messages and alerts will appear under the **Mail** and **Alerts** section.

Note: *Received messages will be automatically deleted after 90 days.*