



## SYSTEM UPGRADE

# PREPARE FOR OUR SYSTEM UPGRADE

FEBRUARY 10 — 13, 2023

## CUSTOMER CHECKLIST

Exciting projects are happening at Ixonia Bank! We're working hard to provide a better banking experience. Here are some things our *personal banking* customers can do for a smooth transition.

### WHAT YOU CAN DO NOW

- VERIFY** Ixonia Bank has current contact information:
  - Address
  - Phone Numbers
  - Email Address
- ONLINE PAYMENTS** through Bill Pay, Zelle or Internal Transfers should be scheduled prior to February 9 or after February 13.
- KEEP** extra cash and/or another payment option (credit card) on hand between February 10-13, as an added precaution.
- PRINT or DOWNLOAD** any statements you'll need before February 10. eStatements will not be immediately available after the upgrade.
- QUICKBOOK USERS**, as a precaution, have a recent backup completed by February 10.

We will be sending additional information as we get closer to the upgrade. Please visit [IxoniaBank.com/System-Upgrade](https://IxoniaBank.com/System-Upgrade) for updates.

Flip for post-upgrade info.



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# POST-UPGRADE CHECKLIST

## WHAT YOU'LL NEED TO DO ON OR AFTER FEBRUARY 13

- LOGIN** to Online Banking via desktop or mobile browser.

**NOTE:** Your username will stay the same. Your temporary password will be your 5-digit Postal Zip Code and last 4 digits of Tax ID Number, i.e. Social Security Number, etc. Change your password.

**Complete this step before accessing mobile banking.**

- DOWNLOAD** Ixonia Bank's new mobile app.

- CHECK** eStatements enrollment.

- Go to "Accounts," then "Documents" in Online Banking.

- Enroll in eStatements.

**NOTE:** Previous eStatements *may not* be immediately available. You may get paper copies for a cycle or two while the system updates after you enroll.

- SET** alerts to manage account(s) and protect against fraud under "Self Service" menu.

- REVIEW** or **RE-ESTABLISH:**

- Recurring payments in Online Bill Pay.

**NOTE:** If you have duplicate recurring payments (Ex: mortgage payment on 1<sup>st</sup> and 15<sup>th</sup> each month for \$500 each), switch to "Pay Twice A Month" model for first payment and delete the second.

- Recurring internal Online Banking transfers will need to be re-established.

- eBills need to be re-established with billing vendor(s).

**Thank you!** We are grateful for our relationship with you, and look forward to serving you better in the future.

