

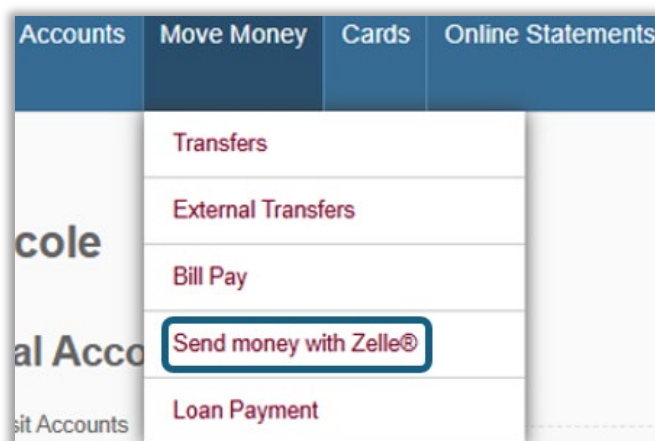
Zelle

Overview

Zelle® is a convenient, fast, and private way to send and receive money with friends, family and others you know and trust, even if they bank somewhere different from you. All you need is your recipient’s email address or U.S. mobile number and money will be sent directly from your account to theirs in minutes. Account numbers **do not** need to be shared.

Enrolling into Zelle

1. From the main menu, under “**Move Money**”, select “**Send money with Zelle®**” or you can access “**Use Zelle**” in the **Quick Action** buttons at the top right of the screen.



2. From the “**Choose How to Enroll with Zelle®**” page, enter an email address, mobile phone number, or both.

Note: If your token (email or phone) is associated with or linked with another Zelle profile at another Financial Institution, that token may not be used.

Creating/ Removing a Contact

Create

1. Click on . Enter the First Name, Last Name (Nickname is optional) and their token (**Email** or **Mobile** *is preferred*). Click **Save**.

Remove

1. Click on the selected contact, select .

Add New Contact

NEW RECIPIENT

Personal Business

First Name

Last Name

Nickname (Optional)

Enter at least one email, mobile or account for your contact.

Email +

Mobile +

Account +

BACK SAVE

Contact Details

DL

First Name
Danielle

Last Name
[REDACTED]

Nickname (Optional)
Testing

Email +

Mobile +
(508) [REDACTED]

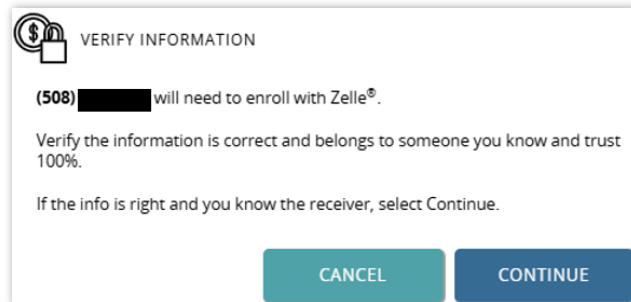
Account +

Remove Contact

BACK

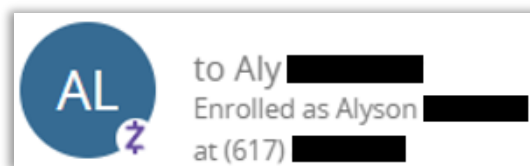
Sending Funds via Zelle®

- From the Zelle screen, select a Recipient. The system will confirm the following:
 - If the other token is currently enrolled with Zelle®. If not, the following message will appear.

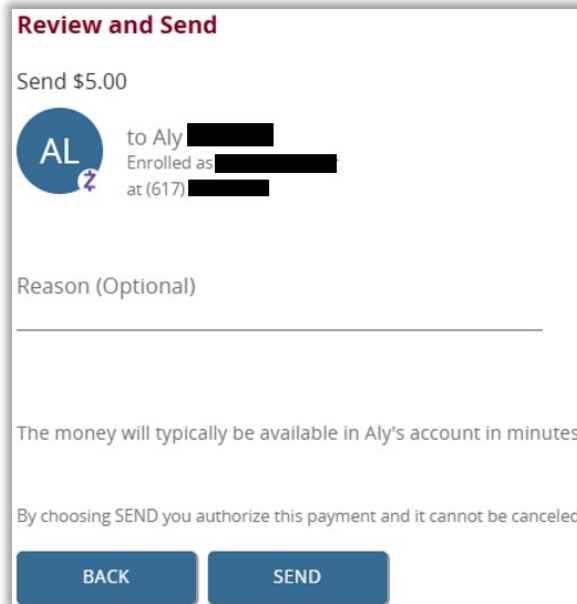


- If the individual’s name matches what is listed in the Zelle Network.

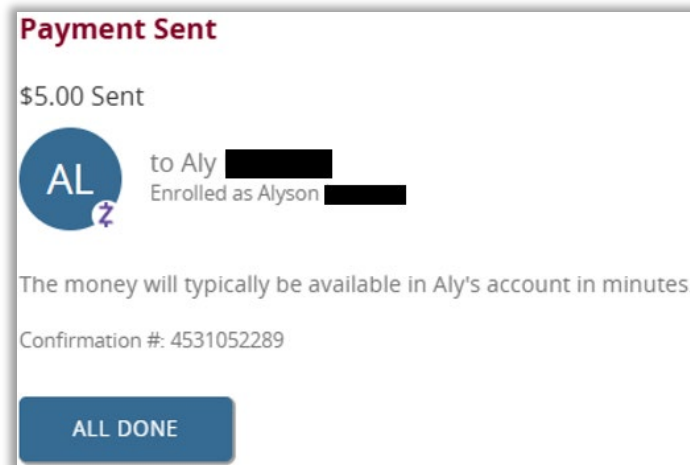
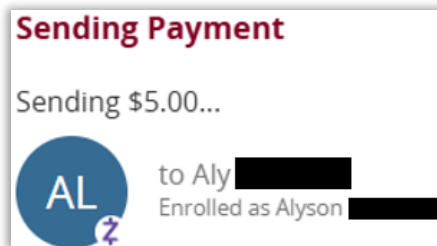
Note: Make sure the individuals name matches (or is a known nickname) to what they are “Enrolled as” in Zelle®.



2. Review the information all matches, click “Continue”.
3. You can enter a “Reason” (which is optional), then click “Send”.



4. You will receive a status message that the payment is sending and will disclose the timing of the payment. Click “ALL DONE” once the payment is complete.



5. If you would like to view any of your activity, click on the “Activity” tab.
6. To update tokens, edit or create new contacts and/or create a QR code so you can provide to other Zelle® users, click on the “Settings” tab.

