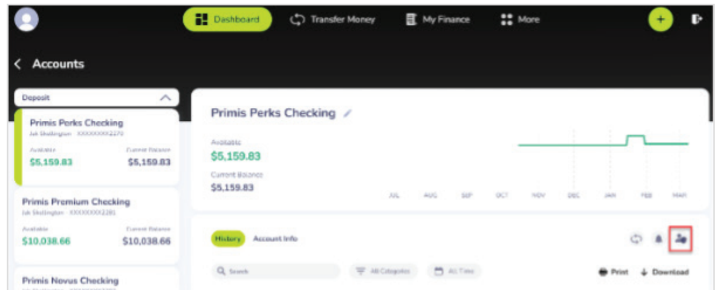
HOW TO ADD OR MANAGE BENEFICIARIES IN ONLINE BANKING

Want to add or update a beneficiary for your account? You can do it anytime using your Online Banking from any device. While this function is not available in the app, you can still access from a browser on your computer, laptop, tablet or phone.



Pro Tip: At this time, beneficiary updates can only be made through the web — not in the mobile app.

How to Add a Beneficiary

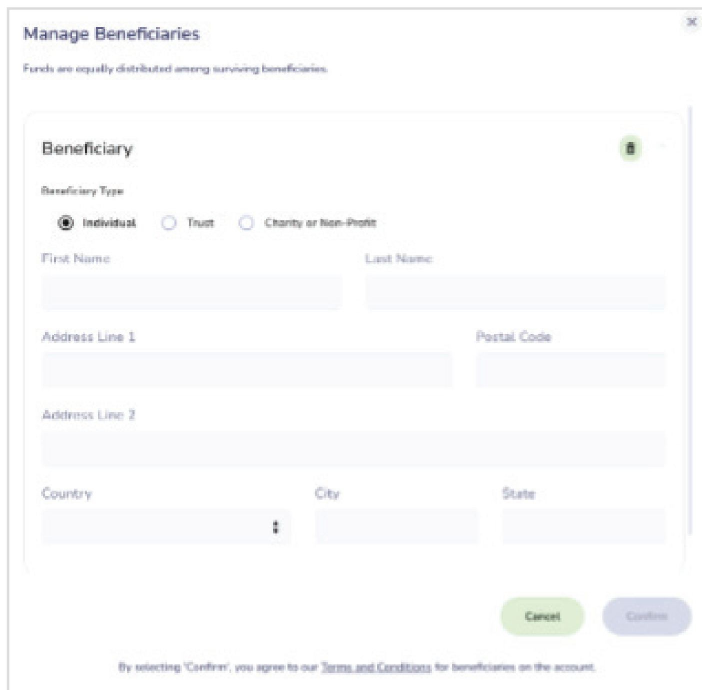
1. Log in to your **Online Banking** from any device.

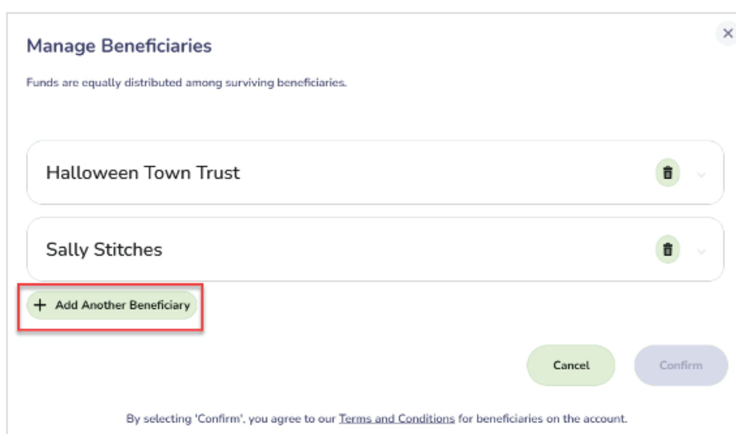
2. Click on the account you'd like to add a beneficiary to.

3. Look for the person icon above the "Download" button and click it.

4. On the **Manage Beneficiaries** screen:

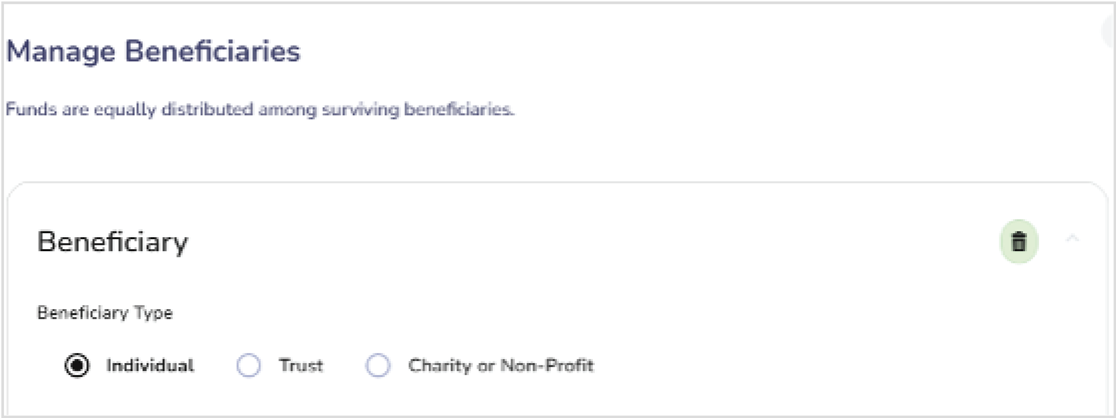
- If you don't have any beneficiaries yet, a blank form will appear.
- If you already have beneficiaries, click **Add Another Beneficiary** to get started.





5. Choose the type of beneficiary you'd like to add:

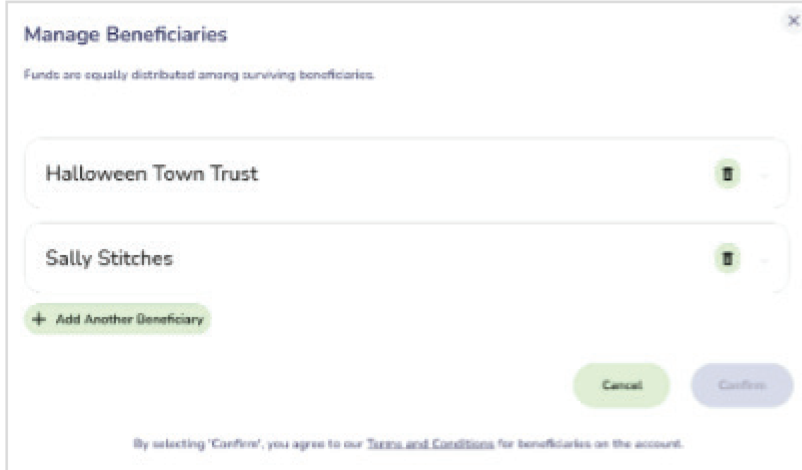
- Individual
- Trust
- Non-Profit



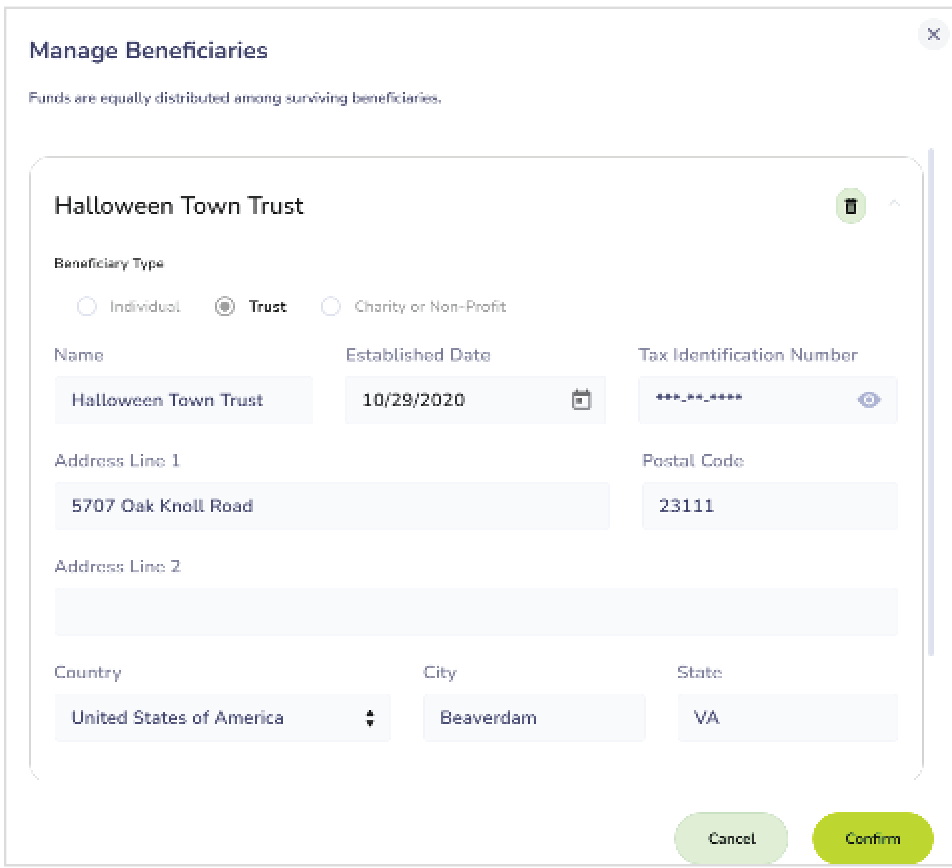
6. Fill out the required fields and click **Confirm**.
That's it!

How to Edit a Beneficiary

1. From the **Manage Beneficiaries** screen, click on the beneficiary you'd like to update.

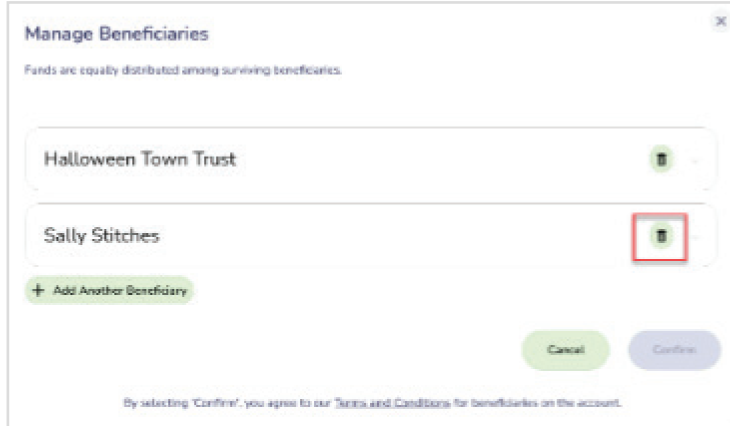


2. Update the fields as needed, then click **Confirm** to save your changes.

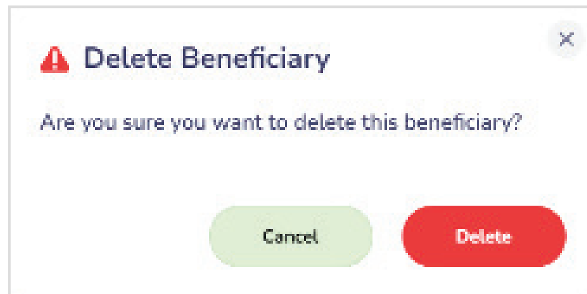


How to Remove a Beneficiary

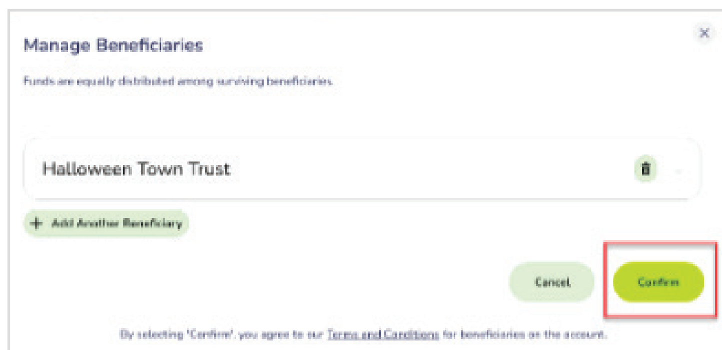
1. On the **Manage Beneficiaries** screen, click the trash can icon next to the name you want to remove.



2. Confirm by clicking **Delete**.



3. One more step: Be sure to click **Confirm** again on the Manage Beneficiaries screen to finalize the change. If you don't, the update won't be saved.



Need Help?

If you have any questions or run into issues, we're here to help.

Email us at **digitalcustomercare@primisbank.com** or call **1.833.4PRIMIS (833.477.4647)**