

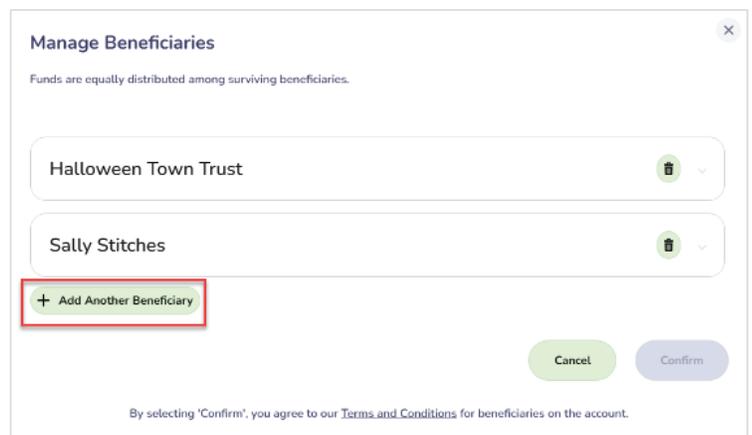
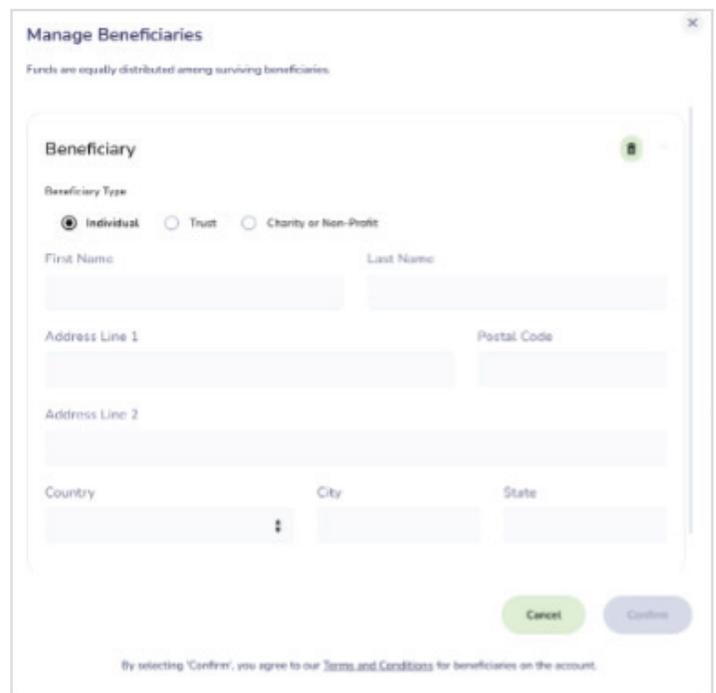
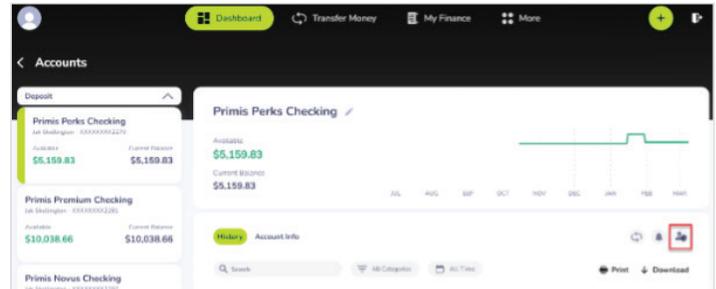
HOW TO ADD OR MANAGE BENEFICIARIES IN ONLINE BANKING

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.

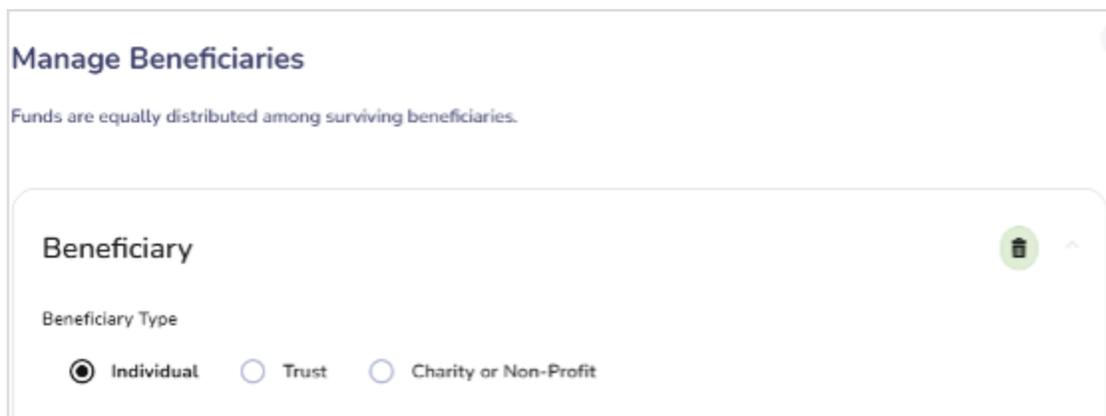
How to Add a Beneficiary

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

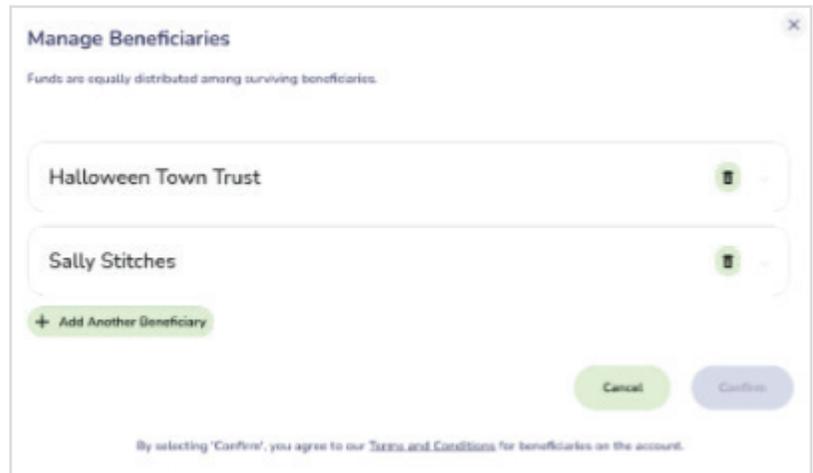


The screenshot shows a web interface titled "Manage Beneficiaries". Below the title, it states "Funds are equally distributed among surviving beneficiaries." There is a section titled "Beneficiary" with a trash icon and an upward arrow. Underneath, it says "Beneficiary Type" and provides three radio button options: "Individual" (which is selected), "Trust", and "Charity or Non-Profit".

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

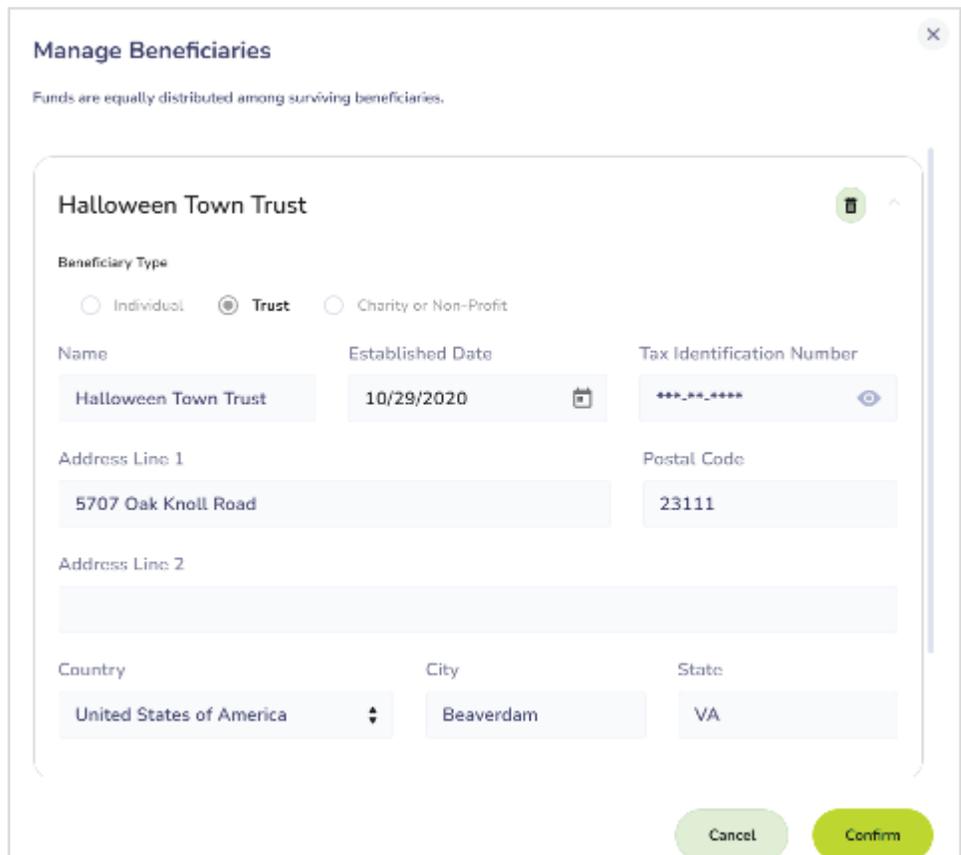
How to Edit a Beneficiary

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



The screenshot shows the 'Manage Beneficiaries' interface. At the top, it says 'Manage Beneficiaries' with a close button (X). Below that, a note states 'Funds are equally distributed among surviving beneficiaries.' There is a list of two beneficiaries: 'Halloween Town Trust' and 'Sally Stitches'. Each entry has a trash icon and a minus sign. Below the list is a green button labeled '+ Add Another Beneficiary'. At the bottom right, there are two buttons: 'Cancel' (green) and 'Confirm' (blue). At the very bottom, a small disclaimer reads: 'By selecting 'Confirm', you agree to our Terms and Conditions for beneficiaries on the account.'

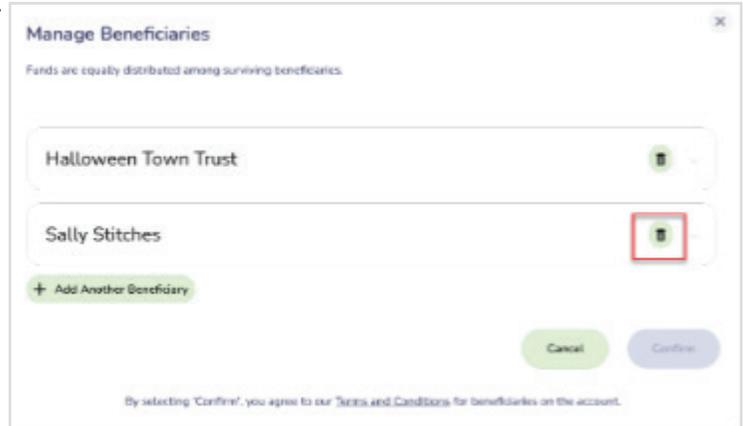
2. Update the fields as needed, then click **Confirm** to save your changes.



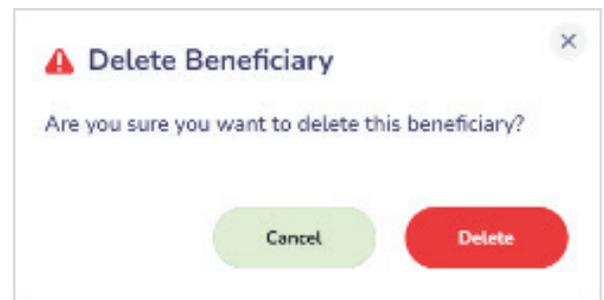
The screenshot shows the 'Manage Beneficiaries' interface with the edit form for 'Halloween Town Trust' open. The title 'Manage Beneficiaries' and the note 'Funds are equally distributed among surviving beneficiaries.' are at the top. The beneficiary name 'Halloween Town Trust' is at the top of the form, with a trash icon and a plus sign. Below the name, there are three radio buttons for 'Beneficiary Type': 'Individual', 'Trust' (which is selected), and 'Charity or Non-Profit'. The form has several input fields: 'Name' (Halloween Town Trust), 'Established Date' (10/29/2020 with a calendar icon), 'Tax Identification Number' (masked as ***-**-**** with an eye icon), 'Address Line 1' (5707 Oak Knoll Road), 'Postal Code' (23111), 'Address Line 2' (empty), 'Country' (United States of America with a dropdown arrow), 'City' (Beaverdam), and 'State' (VA). At the bottom right, there are two buttons: 'Cancel' (green) and 'Confirm' (blue).

How to Remove a Beneficiary

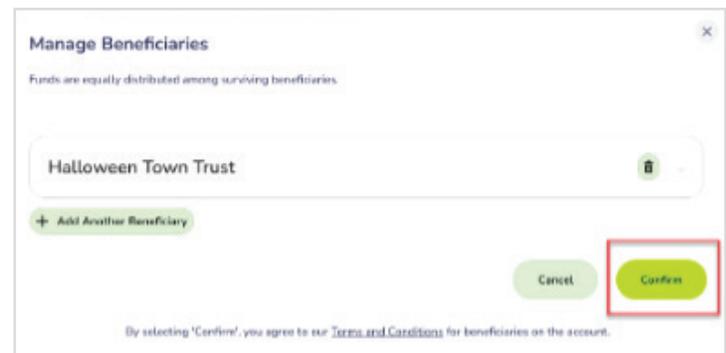
1. On the **Manage Beneficiaries** screen, click the trash can icon next to the name you want to remove.



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 digitalcustomer care@primisbank.com or call **1.833.4PRIMIS (833.477.4647)**