JOHNSON FINANCIAL GROUP®

BANKING   WEALTH   INSURANCE

Friends & Family Kick Off

ACCESS JFG

September 29, 2020

Agenda

Introducing AccessJFG

Sarah Berndt

SVP Treasury Management

What to Expect

Shelley Holzman

VP Treasury Management Product Team Leader

Learning Journey

Kyle Kasbohm

AVP Treasury Management Training Specialist

Support

Sarah Berndt

SVP Treasury Management

Q+A

Q&A Feature Enabled – Submit to All Panelists

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Thank you

- Thank you for offering to participate in this select Friends and Family group

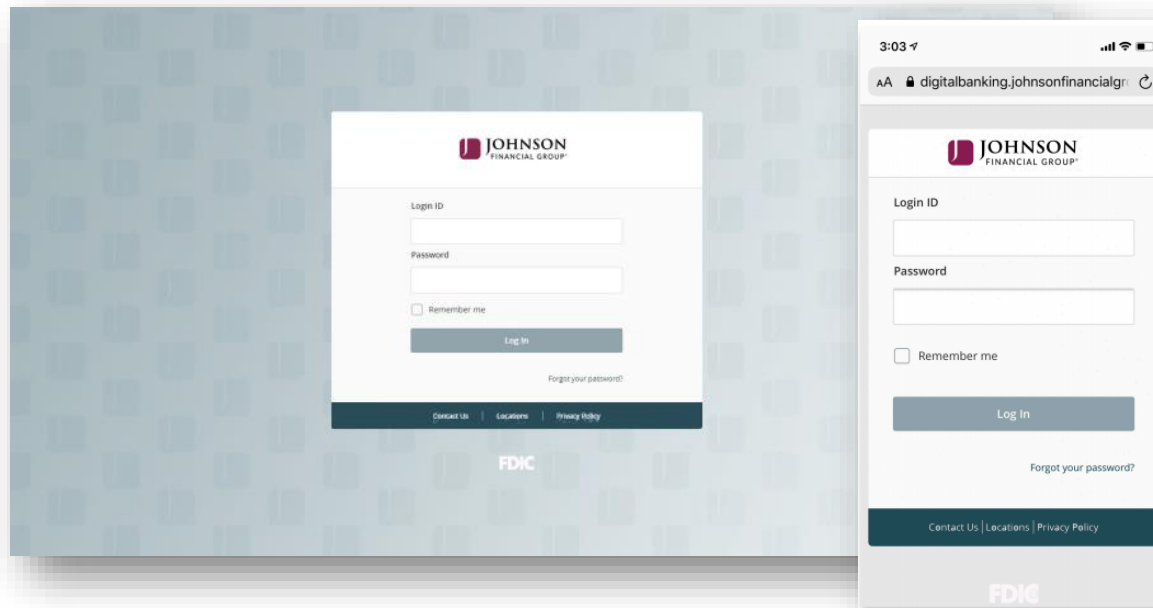- Your feedback is **invaluable!**

- Why are we transforming?

Introducing AccessJFG

Same Trusted Service with a Modern Experience

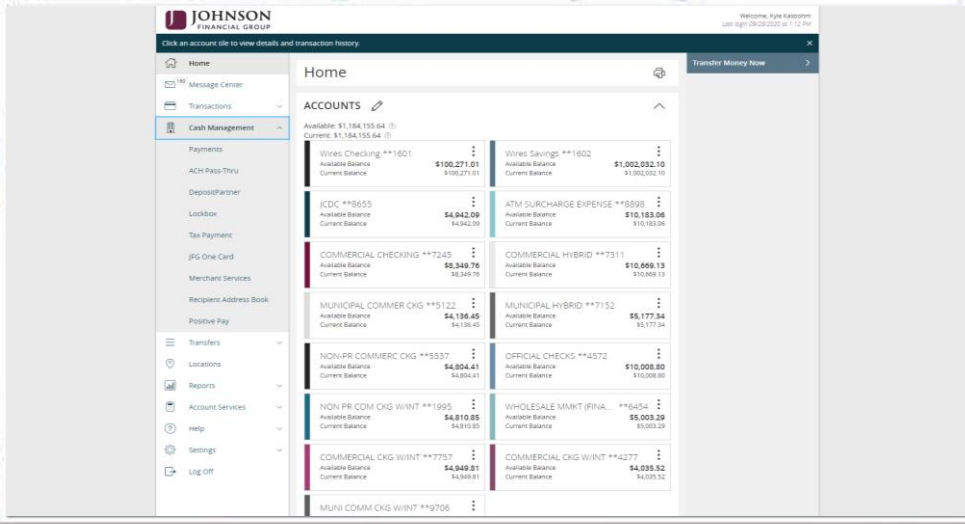| Intuitive Design	Device Consistency Desktop * Tablet * Mobile	***One*** Single sign-on Digital Experience

Experience AccessJFG

Old Business Gateway

New Digital Banking

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We Heard You

Benefits

Convenience
of single sign-on to access online banking solutions with enhanced full mobile capabilities

Time savings
with self-password resets and streamlined wire entry

Updated technology
will give you peace of mind for your financial security

Real-time access
to payments and deposits

Organization and control
with ability to customize views by user

Enhanced reporting
to help run your business

Key Dates

- 10/2: "Black Out Period" for Administrative Changes in Business Gateway
- 10/5: All Commercial Client Communication
- 10/9: Upload and approve any payment files by 4:00 PM CST
  - *No online access from End of Business Day until morning of October 13th*
- 10/12: Federal Banking Holiday with no processing of transactions.
- **10/13:**
  - *Watch for Email with Login Site*
    - *Save as a Favorite in Chrome, Firefox or Edge – will not work in Internet Explorer*
  - *Go live in AccessJFG*
  - *Business Gateway*
    - ACH Notifications of Change/Return Reports & EDI Reports will need to be accessed through Business Gateway
  - *Refer to "Action Items" Following Transition*
- Week of 10/26: Feedback Survey – complete by October 30th

Preparing for Migration

Before October 13th

❑ *Follow Migration Checklist*

❑ *Wire Templates - Save Address Information*

❑ *Take note of current alerts in Business Gateway*

❑ *Share New AccessJFG credentials with all company users:*

- Email will be sent to all users on October 13th
- **New User ID:**

  Combine current Customer ID (exclude 288) with your current User ID
  - *Example:*
    - » Current Customer ID: **288JFG** & User ID: **jdoe**
    - » New User ID: **JFGjdoe** (not case sensitive)
- **New Password:** Use Most Recent Business Gateway Password
  - *Password must be reset upon first login*

Learning Journey

A detailed guide to ensure a success migration

» *Available via AccessJFG Friends & Family website*

Overview Videos

» *Combined Length – 20 minutes:*

1) First Time Login for Converting Users
2) AccessJFG Overview
3) ACH Transactions
4) Wire Payments

Learning Journey Guides

Required Guides for All Users:

✓ First Time Login for Converting Users

✓ Navigating the Home Page, within Accounts and sending Secure Messages

✓ AccessJFG Overview Video

Additional Items Required for all ACH and/or Wire Users:

✓ ACH Transactions

✓ ACH Pass-Thru

✓ Wire Payments

✓ ACH or Wire Payments Using Templates

✓ Approving ACH and Wire Transactions

✓ Managing ACH & Wire Recipients

Learning Journey Guides (cont'd)

Reference Guides for All Users:

✓ Information Reporting

✓ Transferring Funds

✓ Statements

✓ Updating Password & Secure Access Code Phone Numbers

✓ General Guides

 ✓ *Check Reorder, Stop Payment, Account Labels, etc.*

Priority for all Administrators:

✓ Managing Corporate Users and User Roles

Action Items Following Transition

Following Go Live on October 13ᵗʰ

- ❑ *Spot Check*
  - ❑ Wire Templates transitioned successfully
  - ❑ Approval Required Alerts for ACH and Wire Transfers
    - • *Instructions located in Alerts Guide and Approving Transactions Guide*
  - ❑ ACH Templates
- ❑ *Download the App (Coming Soon!)*
- ❑ *Pull EDI and ACH Notifications of Change/Return reports from Business Gateway*
  - ❑ Link to Business Gateway will be found within AccessJFG

Dedicated Support

Special Support Team

» *Available from 8am to 5pm CST*

» *In order to ensure a successful migration, please complete the Migration Checklist and Learning Journey.*

» *Time sensitive transactions will be a priority.*

❑ *Phone 262-619-2155*

   ❑*Dedicated number only available during Friends and Family Period*

❑ *Email tmsupport@johnsonfinancialgroup.com*

❑ *Your local Treasury Management Team*

Q & A

Questions can be submitted via the Q&A Feature in WebEx
Please Send Question to "All Panelists"

Thank you for participating!

Your commitment to AccessJFG Friends & Family
is key to our success!