

Next Level Digital Banking Checklist

As a result of Becoming Extraordinary Together, we are taking your digital banking experience to the Next Level beginning November 6, 2023! To prepare, you will be temporarily unable to access your accounts beginning Friday, November 3, at 3:00 p.m. MST, until Monday, November 6, at 7:00 a.m. MST. Bill Pay will be unavailable beginning Monday, October 30, 2023.

We've prepared the following checklist to assist you. If you have any questions, contact our Client Care Team at (844) 261-2548.

BEFORE OCTOBER 30, 2023

Bill Pay Users

- Bill Pay will not be available for a week beginning October 30, 2023. Preplan payments that need to be made during this week in advance.
- For personal users, payees, payment history, and automatic payments will transfer to the new system. Recurring activity will need to be re-established.
- Business users will need to re-establish all Bill Pay activity in the new system. Document any needed information from the current system before October 30, to assist with setup in the new system.

BEFORE NOVEMBER 3, 2023

Confirm your email and phone are correct

- It's important we have your correct phone and email before the upgrade so that you can authenticate your device. To confirm, log in to personal online banking and click to view your profile. Business online banking users will need to contact their banker.

Make sure you know your current User ID and Password

- You will need your current User ID/Password for your first-time login. Click to view your profile or select "forgot password" on the login screen to reset it.

Take screenshots of your account activity

- Your history will not migrate into the new system. Take screenshots or print information that you will need for future.

Visit our Digital Banking Resource Center: crossfirstbank.com/next-level

- Our Resource Center contains additional information specific to the features you use (E.g. Bill Pay, Card Controls, Quicken/QuickBooks®, ACH & Wires, Positive Pay, Quicken®/QuickBooks®, etc.)

ON/AFTER NOVEMBER 6, 2023

Log in at crossfirstbank.com or through the CrossFirst Bank Mobile App

- Mobile banking users will need to delete your old app and reinstall the new CrossFirst Bank Mobile App.

Re-establish account alerts

- You will need to re-establish your alerts under Settings > Alert Settings.

View new consumer debit card control options

- View and enable your card controls per your preferences by selecting Account Service > Card Controls.

Explore your new digital banking platform

- Access your accounts and additional features, including our new Personal Financial Management Tool and the ability to link your accounts at other financial institutions, all in one place.

*Taking Digital
Banking to the*

**NEXT
LEVEL**