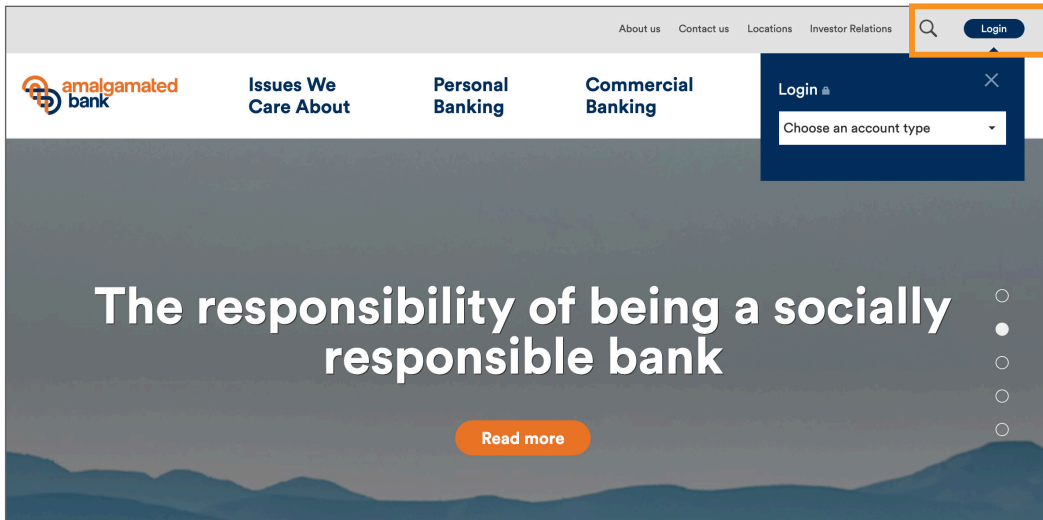
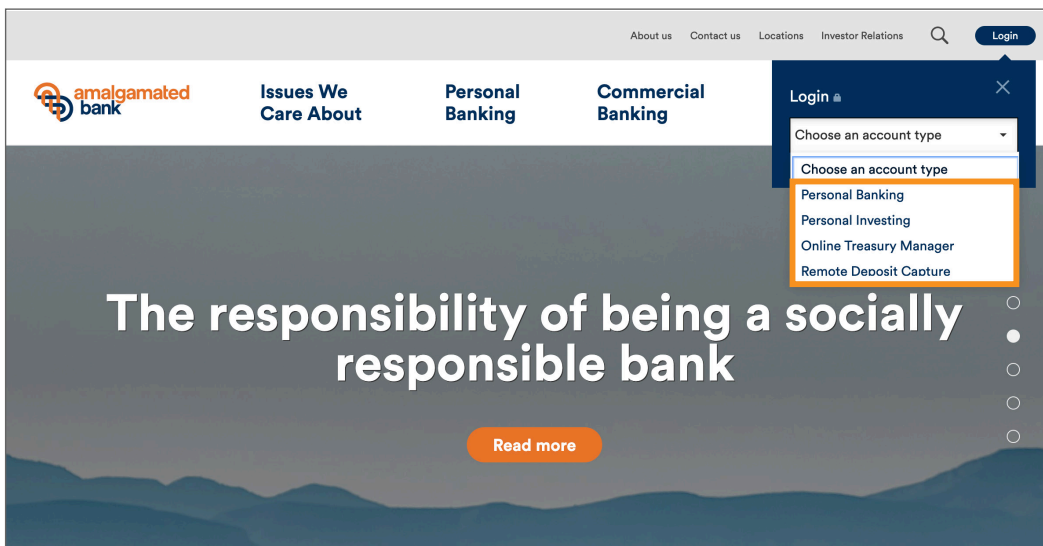


# Online Banking Enrollment Quick Reference Guide



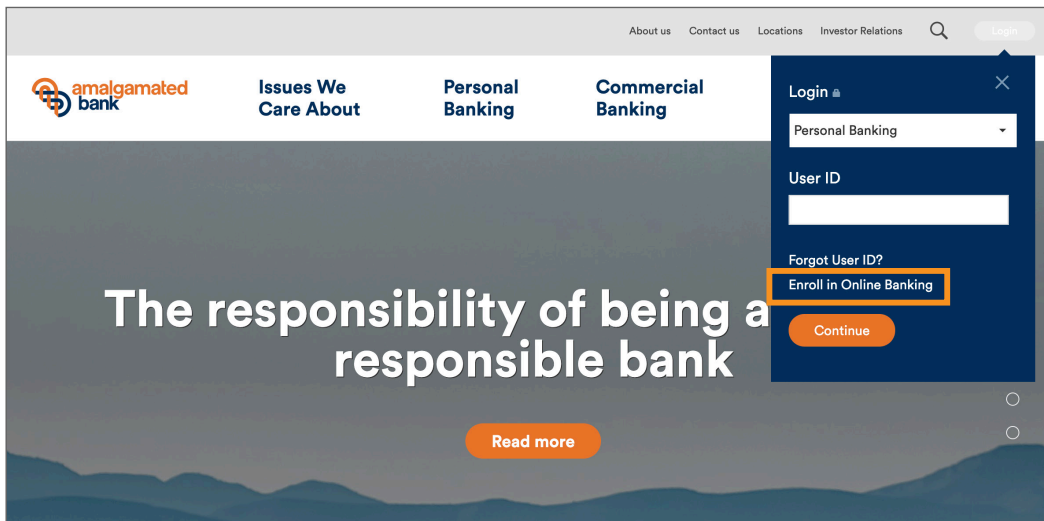


**STEP 1** Navigate to [www.amalgamatedbank.com](http://www.amalgamatedbank.com). To begin enrollment, select “Login.”



**STEP 2** From the dropdown menu, choose “Personal Banking” as the account type.





STEP 3 Select “Enroll in Online Banking” to continue.

A screenshot of the "Welcome to Online Banking" enrollment page. The page title is "Welcome to Online Banking". It lists three steps: 1. Select an account type, 2. Read and accept online disclosures and agreements, and 3. Enter your account information for verification purposes. Below this, it states "You are then ready to start managing your money online." and "If you select one of the following account types, you will receive instant access online. If you have more than one account, you will get access to your other accounts as well." There are three radio button options: "Checking, Savings or Money Market Account" (selected), "Loan Account", and "Certificate of Deposit (CD) Account". Below these, it says "We ask that you read our [Electronic Records Disclosure and Online Banking Agreement](#) and select the following box to indicate that you agree to the terms of use." There is a checkbox that is checked, with the text "I have read and agree to the terms of the Online Banking Agreement and Disclosure." At the bottom, there is a link "Don't have an account? You can apply for an [account online](#). Once your account is opened, you can sign up for Online Banking." and an "Officer Code:" input field with the text "FOR INTERNAL BANK USE ONLY." below it.

STEP 4 Select your account type. Once selected, read and acknowledge the “Electronic Records Disclosure and Online Banking Agreement.” Click “Continue.”



Collecting your information.

Please enter your account information.

First Name:

Last Name:

Social Security Number:   
Enter without spaces or dashes. Your Social Security Number is used for identification purposes only and will remain confidential.

Confirm Social Security Number:

E-mail Address:   
For example, name@example.com.

Confirm E-mail Address:

Birth Date (mm/dd/yyyy):     
Please select the month and day of your birth and enter the year. For example, 1952.

Zip:

Please enter your retail checking, savings or money market account information.

Account Number:   
Enter the Account Number associated with your Checking, Savings or Money Market account.

Last Statement Balance:   
The end balance on your last statement for this account.  
If you are a new bank customer and have not received your first bank statement yet, enter 0 for statement balance.

**STEP 5** To complete the application provide the following information:

- First and Last name
- Social Security number
- Email address
- Birth date
- Zip code
- Account number
- Last statement balance  
(If you are a new bank customer and have not received your first bank statement yet, enter “0” for statement balance.)

To proceed, select “Continue.”



**Personal Online Banking Enrollment**

Creating User Profile

Create a User ID and Password for online account access.

**User ID:**   
Allows up to 32 alphanumeric characters. Spaces are allowed within a User ID, but cannot appear at the beginning or end of the User ID. Some special characters are not allowed, for example: |, \, < and >.

**Confirm User ID:**

**Password:**   
A password must be at least 8 alphanumeric characters. It cannot begin or end with a space.

**Confirm Password:**

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Need help? Please contact our Customer Service Department at (555) 555-5555. The privacy and security of your information is important to us. [Learn more.](#)

This Page **CONTINUE** **CANCEL**

**STEP 6** Next, you will need to create a User ID and Password.

**User ID requirements:**

- Between 8 and 32 characters long
- Must contain at least 2 letters and 2 numbers
- Must not contain invalid characters such as a single quotation mark (‘), backslash (\), greater-than symbol (>), or less-than symbol (<)

**Password requirements (note: passwords are case sensitive):**

- Between 8-32 characters long
- Must include at least 1 letter
- Must include at least 1 number
- Cannot include spaces
- Cannot include a character that repeats more than 2 times in a row.
- Cannot include the following characters: “\, <, >, ””

(Note: You can use your User ID and Password to sign up for mobile banking. )





Dear Valued Customer:

Welcome to Online Banking. Now you can enjoy the convenience of our user-friendly Online Banking services 24 hours a day, seven days a week.

We encourage you to take advantage of our versatile and easy-to-use Online Banking features:

- **View your account balance** and activity and access account statements
- **Pay your bills** online without ever writing a check or searching for a stamp
- **Pay individuals** directly with People Pay
- **Transfer money** between your Amalgamated Bank accounts or to an account you have at another bank<sup>1</sup>

Plus, now that you are enrolled in Online Banking, you can download our Mobile Banking app<sup>2</sup> from the [Apple App Store](#) or [Google Play](#). With Mobile Banking, you get the convenience of many of our popular Online Banking features, plus find the nearest surcharge-free Allpoint® ATM<sup>3</sup> and deposit checks using the camera on your smartphone.

Online and Mobile Banking make it simple for you to bank from anywhere at any time.

If you have any questions about our Online and Mobile Banking Services, please contact us at **1-800-662-0860** or [AB-Online@amalgamatedbank.com](mailto:AB-Online@amalgamatedbank.com). Thank you again for being a valued Amalgamated Bank customer and welcome to Online Banking.

Sincerely,

**STEP 7** You will receive an email confirming your online banking enrollment.



For any questions please call Amalgamated Support at 1-800-662-0860. Support is available M-F from 8:00 am- 8:00 pm and Saturday from 9:00 am – 2:00pm ET.

