

## **E-Statement Opt-In - Website** <https://www.bankfortress.com/estatement-opt-in>

In order to view your statement through Internet Banking, you will be required to “Opt In” to E-Statements.

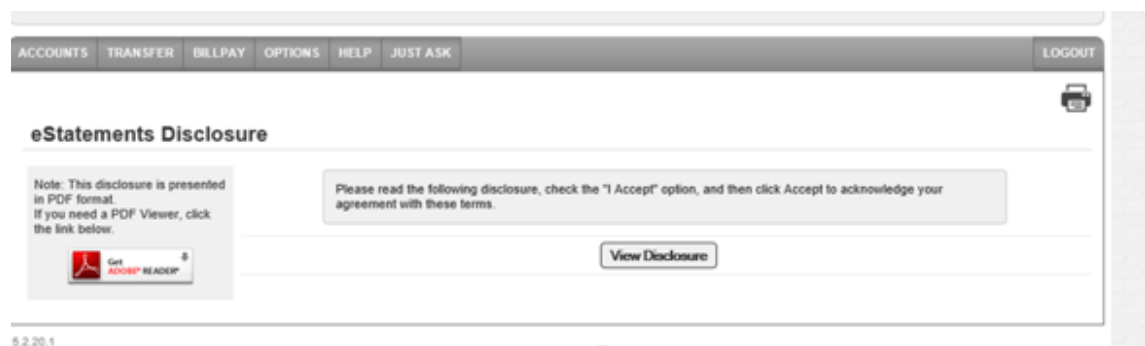
Click on the E-statements Tab when logged into your internet banking, follow the on screen steps to agree to the receiving of statements electronically.

Once opted in you will not have to do this again. This is a one-time acceptance unless you opt out. You will be able to view your statements as soon as you “Opt In”.

If you have not received statements via online internet banking, your first E-statement will be available at the beginning of the next month after the “Opt in” has been accepted.

### **For “Opt-In”**

**1<sup>st</sup> step** – After logging into internet banking under the accounts tab the user will click on the “E-statement” link after which they will get a screen which says “view disclosure”



**2<sup>nd</sup> Step** – once the user clicks on the “View Disclosure” they can see a pop up window with the disclosures: Read and then proceed to next step

**3<sup>rd</sup> Step** – They then accept the disclosure after reading it.

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Check the box below to accept.

If you "Accept" then you are acknowledging that you can read PDF documents and that you understand the terms of this disclosure. If you are unsure, you can click on the Adobe Reader link to visit their site and download a PDF viewer.

If you do not "Accept", you will not be able to view/change eStatements.

I Accept

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**4<sup>th</sup> Step** – After clicking on the “Accept” button they will be presented with “Setup Email List”

### Setup Email List

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The following email address will be used for all correspondence concerning eStatements.

[redacted]@hotmail.com

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If they want to change the email they can click on the pencil icon and update the email address:

**5<sup>th</sup> step** – On this screen the user is presented with the options with different accounts – so they would need to click on the “skip this” or “submit” and proceed on to the next step.

**No need to make any changes. Please click “Submit”**

### One last step...

Please indicate which of the below accounts, which you are not Primary owner of, you want to change to Electronic delivery.

Warning: This will change the notification method to Email for the entire account. Other users on the account will also have to complete the Opt-in process to access the statements electronically.

[Uncheck All](#)

- Independent - SV 000000 [redacted]
- Independent - CK 000000 [redacted]
- Independent - SV 000000 [redacted]

**6<sup>th</sup> Step** – They will be opted in to all the accounts and will be able to see the drop down menu of the accounts for which they want to see the E-statements – click on submit – it will show the date that you want to see the statements for

## Online Statements

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Select a statement date and click "View Statement".

Statement: 09-30-2017

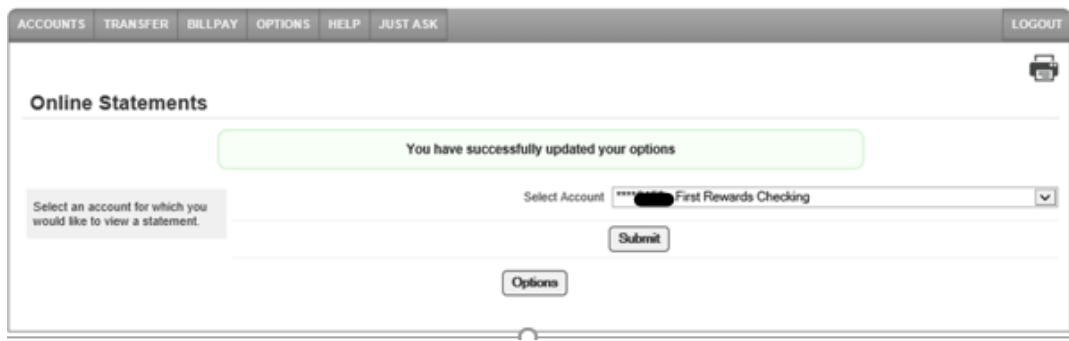
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**7<sup>th</sup> step** – click on View Statements to view the statement for that particular timeframe – when the user clicks it will pop up with a download window for the statement to be opened or downloaded this is in PDF format.

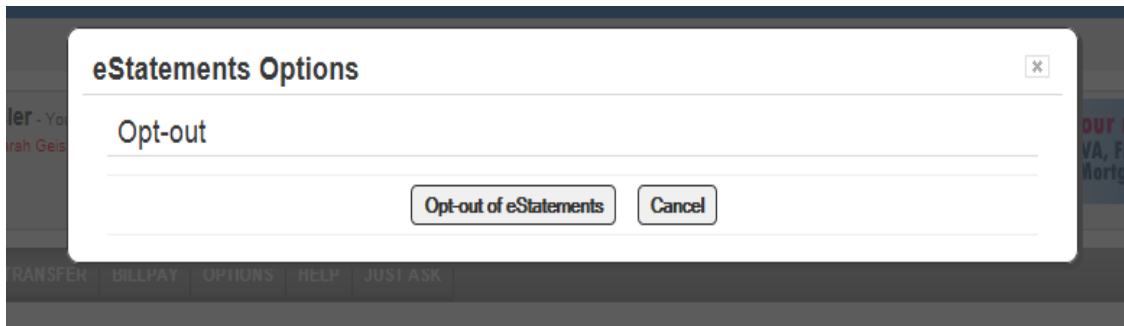
**You have now accepted being “Opted In” for electronic statements .**

## For “Opt-Out”

**1<sup>st</sup> step** – under the accounts tab again click on the “E-statements” tab



**2<sup>nd</sup> step** – the user can see the “Options” button when they click on it a pop up window with the message “opt-out”.



**3<sup>rd</sup> Step** – once the user clicks on the “opt out of E-Statement” they will see a pop up window with a warning sign “Confirm Opt-out”:

## Confirm Opt-out

Warning, you are selecting to revert to receiving paper statements only. You will no longer be able to view your eStatements online. Are you sure you want to continue?

Yes

No

**4<sup>th</sup> Step** – once they click on the “yes” they will again see a pop up window with some verbiage and warning and accounts with check boxes – the user when they opt out they have a choice (unlike opt in) if they need to check or uncheck those boxes (accounts) for E-statements to be in print or email, it is up to the FI on how to handle the opt out process.

### One last step...

Please indicate which of the below accounts, which you are not Primary owner of, you want to change to Print delivery.

Warning: This will change the notification method to Print for the entire account. Other users on the account will also be Opted-out of electronic statements.

You will be Opted-out of unchecked accounts, however you will not receive a Print statement as the delivery method will remain Email and statements will continue to be sent to enrolled users.

[Check All](#)

Independent - SV 0000000000000000

Independent - CK 0000000000000000

Independent - SV 0000000000000000

[Skip This \(You will be opted out of these accounts but will not receive Print statements\)](#)

[Submit](#)

**5<sup>th</sup> Step** – They will be opted out of the E-statements (in this case I have clicked on the “skip this” button for opt out).

You have been opted out of eStatements, and will now receive paper statements only. You will no longer be able to view your eStatements online.

OK

After clicking on “ok” they will be redirected to their accounts page or whatever their default page is inside internet banking.