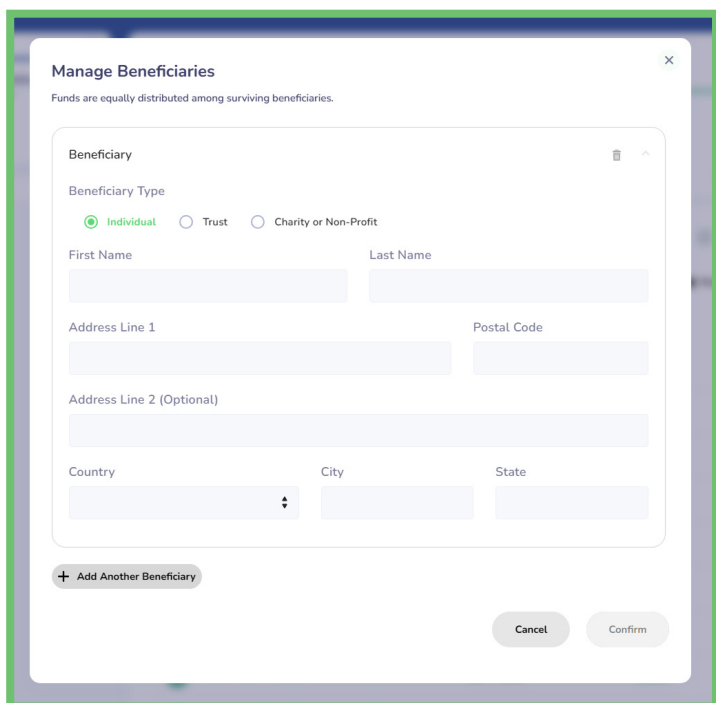


# How to Add or Manage Beneficiaries

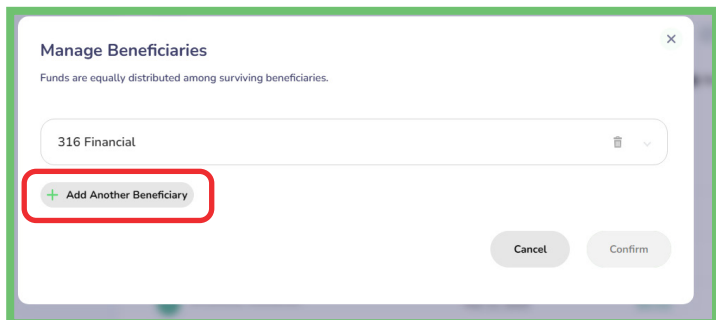
Want to add or update a beneficiary for your account? You can do it anytime using online banking from any device. While this function is not available in the app, you can still access from a browser on your computer, table or phone.

## How to Add a Beneficiary

1. Log into **online banking** from any device.
2. Click on the account you'd like to add a beneficiary to.
3. Click on the the icon of a person located above the **Download** button.
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.



The screenshot shows the 'Manage Beneficiaries' interface. At the top, it says 'Manage Beneficiaries' and 'Funds are equally distributed among surviving beneficiaries.' Below this is a 'Beneficiary' section with a trash icon and an expand/collapse arrow. Under 'Beneficiary Type', there are three radio buttons: 'Individual' (selected), 'Trust', and 'Charity or Non-Profit'. Below these are input fields for 'First Name', 'Last Name', 'Address Line 1', 'Postal Code', 'Address Line 2 (Optional)', 'Country' (with a dropdown arrow), 'City', and 'State'. At the bottom of the form is a button labeled '+ Add Another Beneficiary'. To the right of the form are 'Cancel' and 'Confirm' buttons.

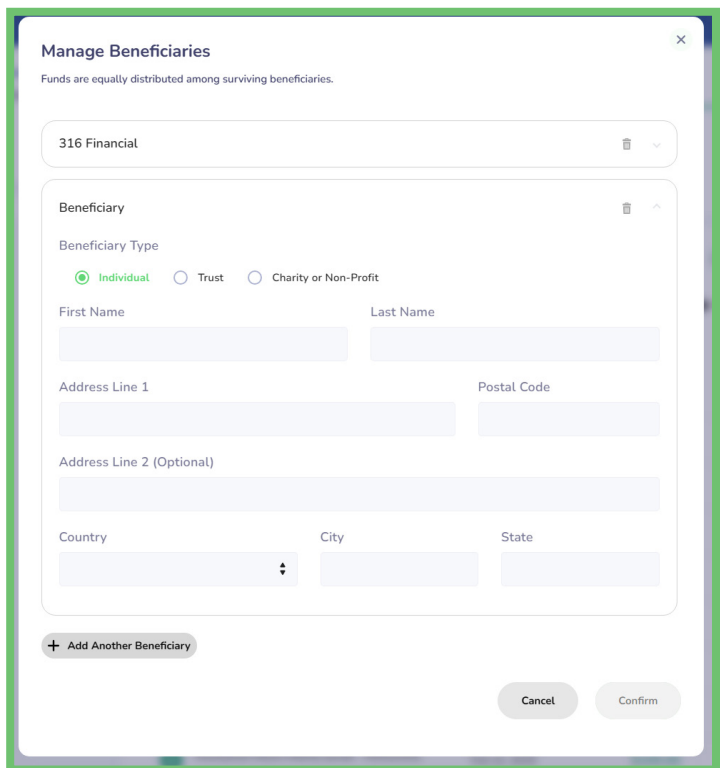


The screenshot shows the 'Manage Beneficiaries' interface with a list of existing beneficiaries. The list contains one entry: '316 Financial' with a trash icon and a dropdown arrow. Below the list is a button labeled '+ Add Another Beneficiary', which is highlighted with a red rectangle. To the right of the list are 'Cancel' and 'Confirm' buttons.

5. Choose the type of beneficiary you'd like to add:

- Individual
- Trust
- Non-Profit

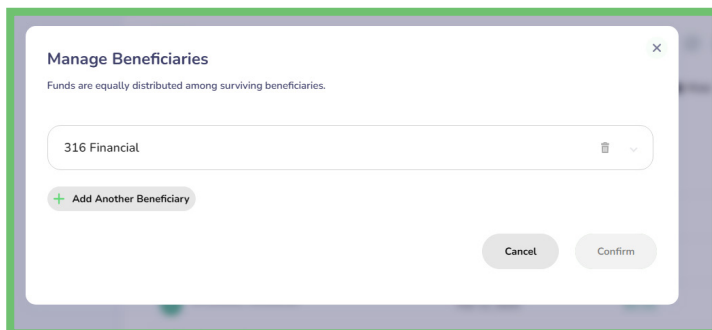
6. Fill out the required fields and click **Confirm**. That's it!



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.' A dropdown menu shows '316 Financial' with a trash icon and a downward arrow. The main section is titled 'Beneficiary' with a trash icon and an upward arrow. Under 'Beneficiary Type', there are three radio buttons: 'Individual' (selected), 'Trust', and 'Charity or Non-Profit'. Below this are input fields for 'First Name' and 'Last Name'. Then, 'Address Line 1' and 'Postal Code' fields. Below that is 'Address Line 2 (Optional)'. At the bottom of the form are 'Country' (with a dropdown arrow), 'City', and 'State' fields. At the bottom left of the form is a button '+ Add Another Beneficiary'. At the bottom right are 'Cancel' and 'Confirm' buttons.

## How to Edit a Beneficiary

1. From the **Manage Beneficiaries** screen, click on the beneficiary you' want to update.
2. Update the fields as needed, then click **Confirm** to save your changes.



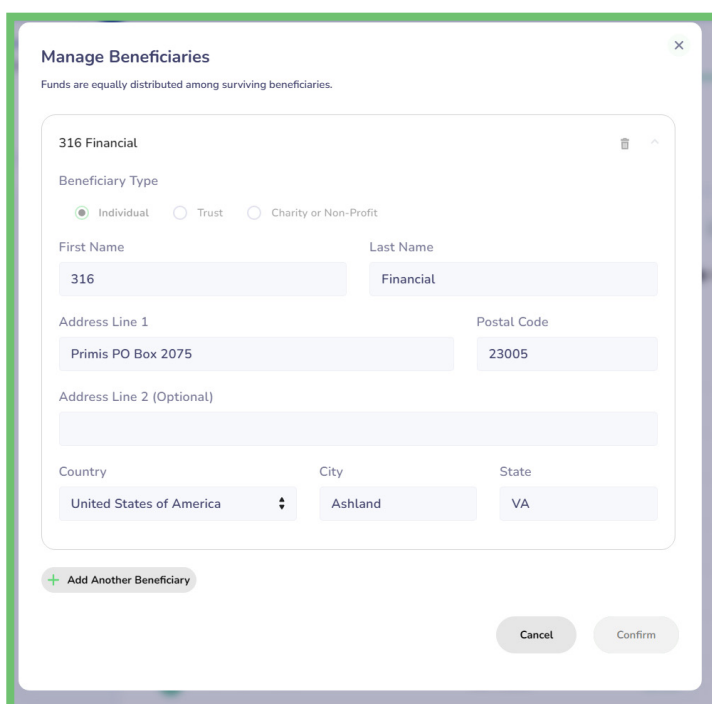
**Manage Beneficiaries** ×

Funds are equally distributed among surviving beneficiaries.

316 Financial 🗑️ ⌵

[+ Add Another Beneficiary](#)

Cancel Confirm



**Manage Beneficiaries** ×

Funds are equally distributed among surviving beneficiaries.

316 Financial 🗑️ ⬆️

Beneficiary Type

☒ Individual ☐ Trust ☐ Charity or Non-Profit

First Name Last Name

316 Financial

Address Line 1 Postal Code

Primis PO Box 2075 23005

Address Line 2 (Optional)

Country City State

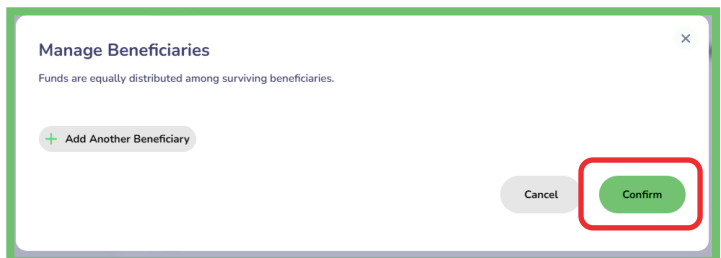
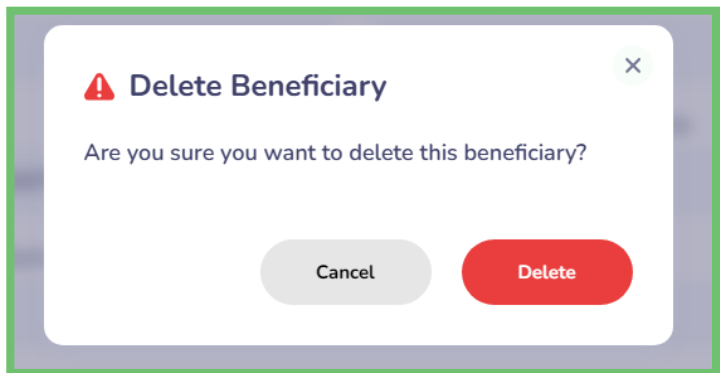
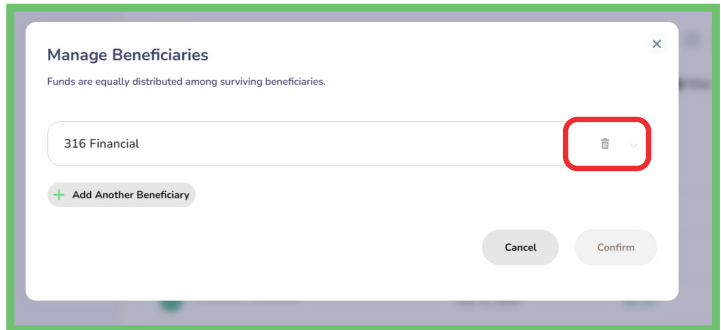
United States of America Ashland VA

[+ Add Another Beneficiary](#)

Cancel Confirm

## How to Remove a Beneficiary

1. From the Manage Beneficiaries screen, click on the trash can icon next to the beneficiary you want to remove.
2. Confirm by clicking Delete.
3. Important: Be sure to click Confirm again on the Manage Beneficiaries screen to save your changes. If you don't, the beneficiary won't be removed.



## Need Help?

If you have any questions or run into any issues, we're here to help.

Email us at [BankingServiceTeam@bank316.com](mailto:BankingServiceTeam@bank316.com) or call **833.316.3167**