316 FINANCIAL

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

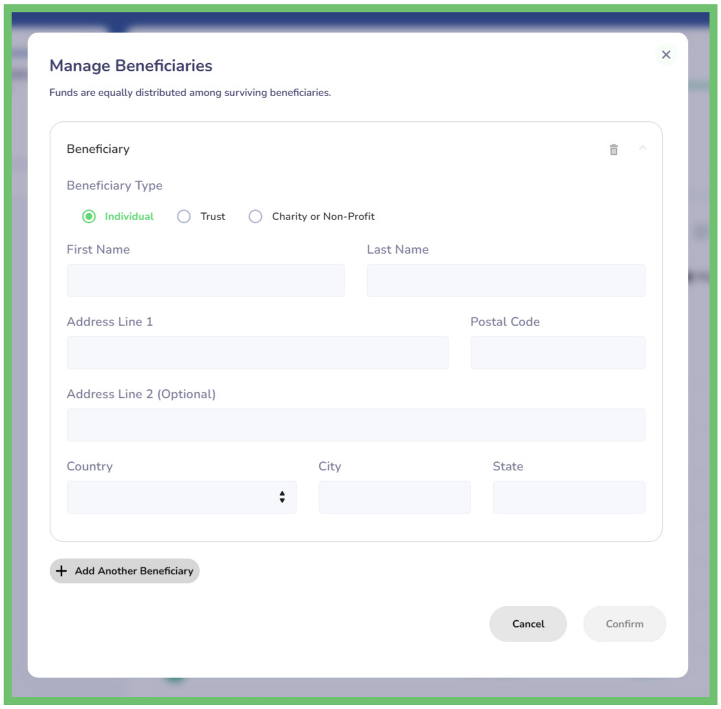
1. Log into **online banking** from any device.

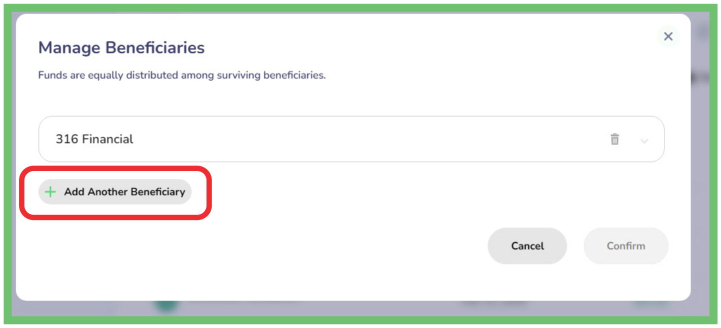
2. Click on the account you'd like to add a beneficiary to.

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.

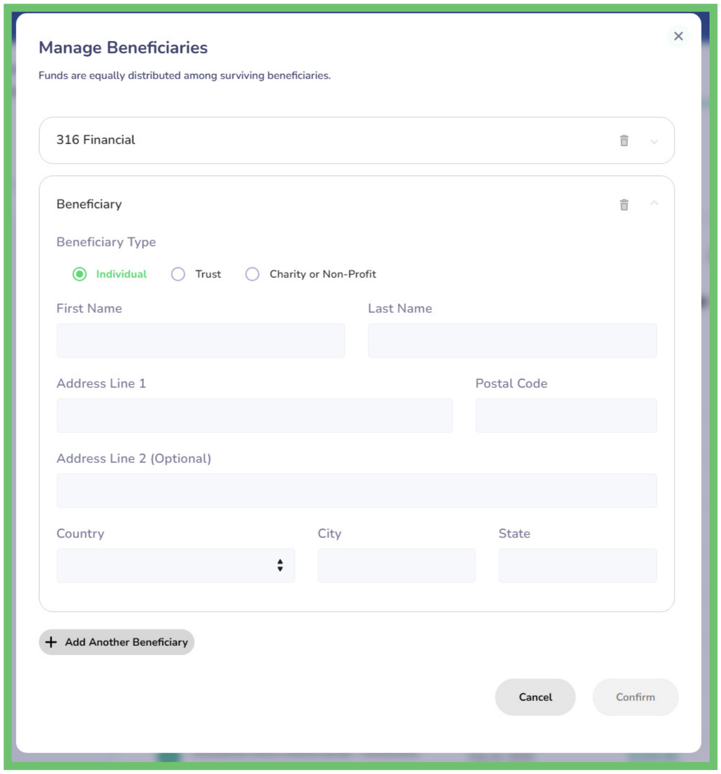




5. Choose the type of beneficiary you'd like to add:

- Individual
- Trust
- Non-Profit

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

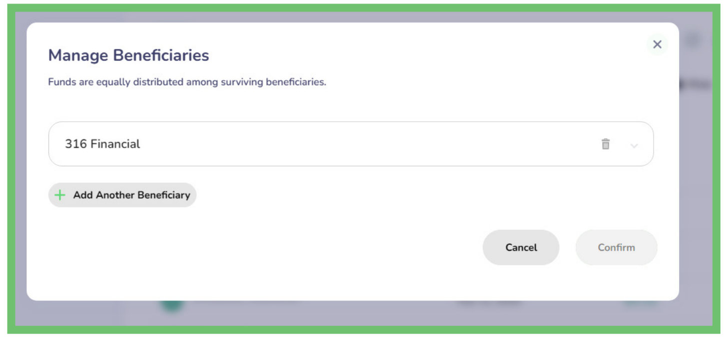


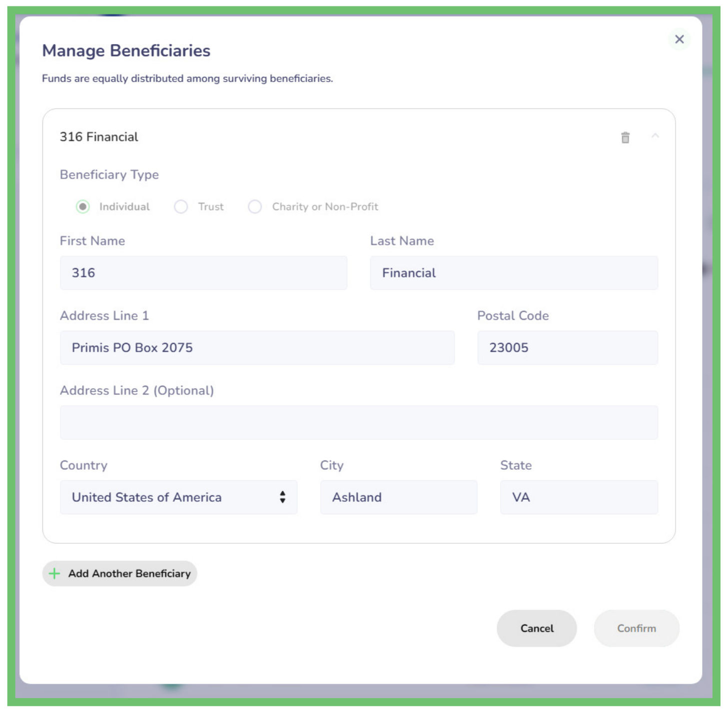
316 FINANCIAL

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.





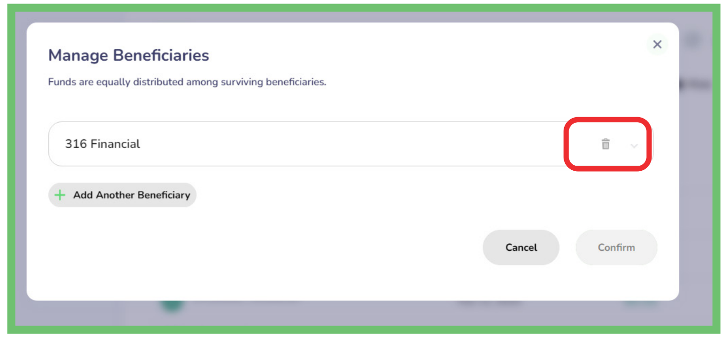
316 FINANCIAL

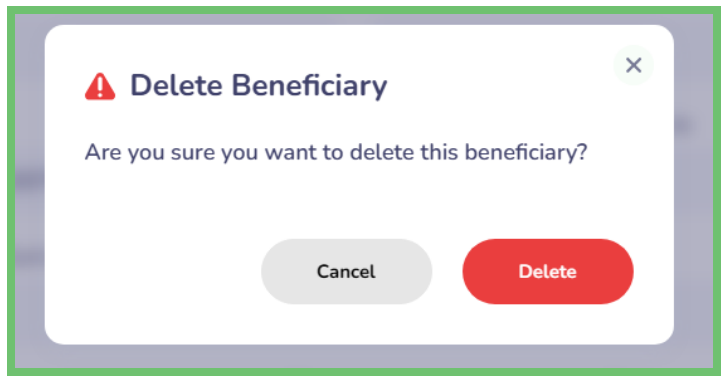
How to Remove a Beneficiary

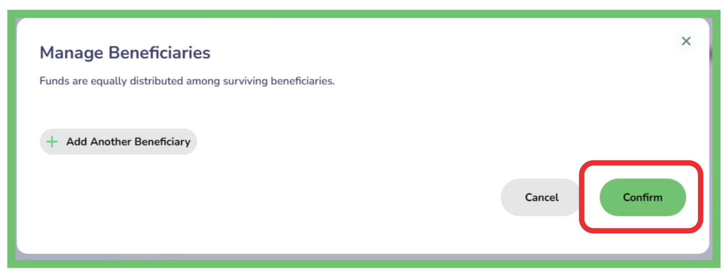
1. From the Manage Beneficiaries screen, click on the trash can icon next to the beneficiary you want to remove.

2. Confirm by clicking Delete.

3. Important: Be sure to click Confirm again on the Manage Beneficiaties 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** or call **833.316.3167**