



Digital Banking

User Guide

Learn how to use Digital Banking with this handy guide.

For questions contact us at 727-335-0500

Member
FDIC

The logo features a blue circle with a white outline. Inside the circle, there is a small, stylized house icon. To the right of the circle, the words "CLIMATE FIRST BANK" are written in a bold, sans-serif font, followed by a registered trademark symbol (®).

CLIMATE FIRST BANK®

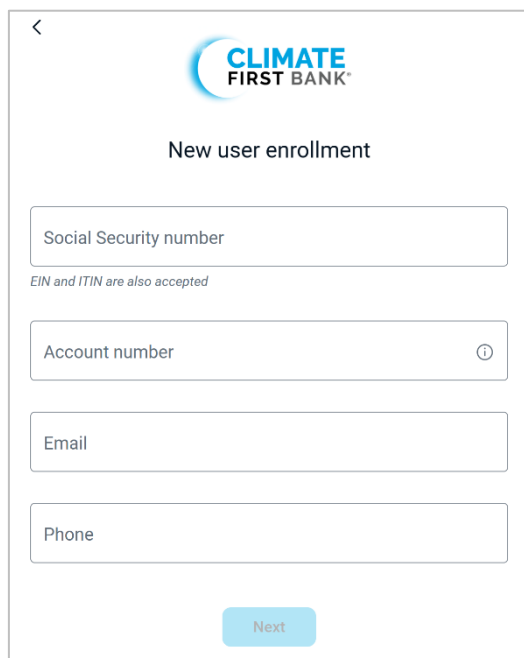
climatefirstbank.com

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First Time Login

1. Navigate to our website and click **LOG IN**.
2. Select **Online Banking Log In** from the options.
3. Select **New User Registration**.
4. Enter your social security number, account number, email, and phone number. Click **Next**.
5. Add an extra layer of security with 2-step verification. Click **Get started**.



<



New user enrollment

Social Security number

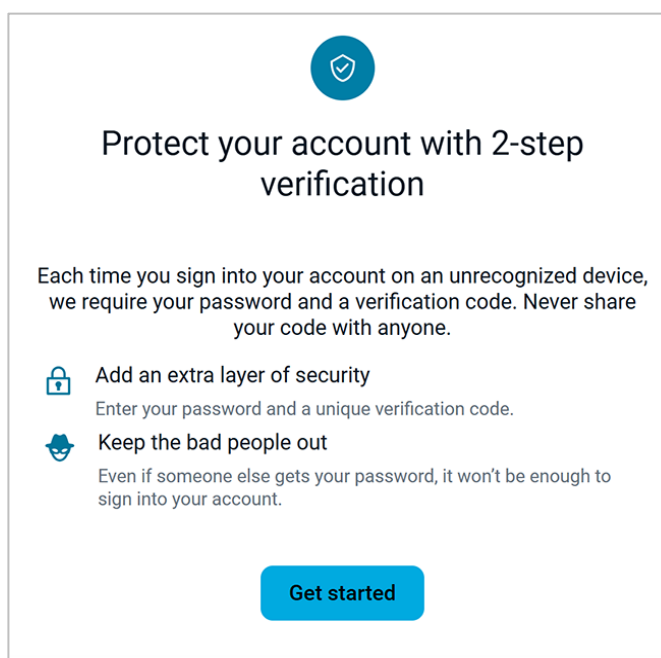
EIN and ITIN are also accepted

Account number ⓘ

Email

Phone

Next





Protect your account with 2-step verification

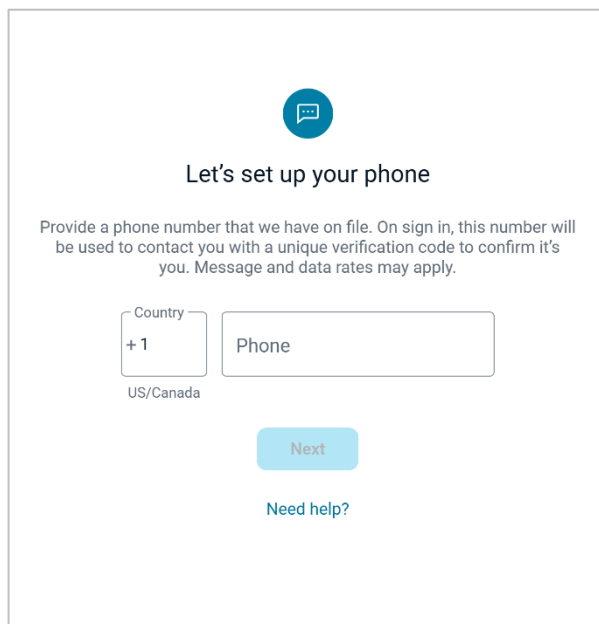
Each time you sign into your account on an unrecognized device, we require your password and a verification code. Never share your code with anyone.

 **Add an extra layer of security**
Enter your password and a unique verification code.

 **Keep the bad people out**
Even if someone else gets your password, it won't be enough to sign into your account.

Get started

6. Provide the phone number associated with your account. Click **Next**.
7. Choose the method by which you would like to receive your verification code. Click **Send code**.



Let's set up your phone

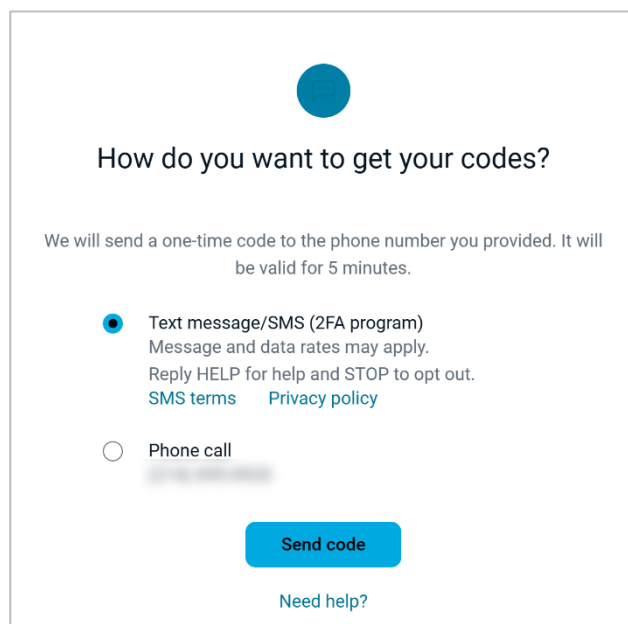
Provide a phone number that we have on file. On sign in, this number will be used to contact you with a unique verification code to confirm it's you. Message and data rates may apply.

Country
+1
US/Canada

Phone

Next

Need help?



How do you want to get your codes?

We will send a one-time code to the phone number you provided. It will be valid for 5 minutes.

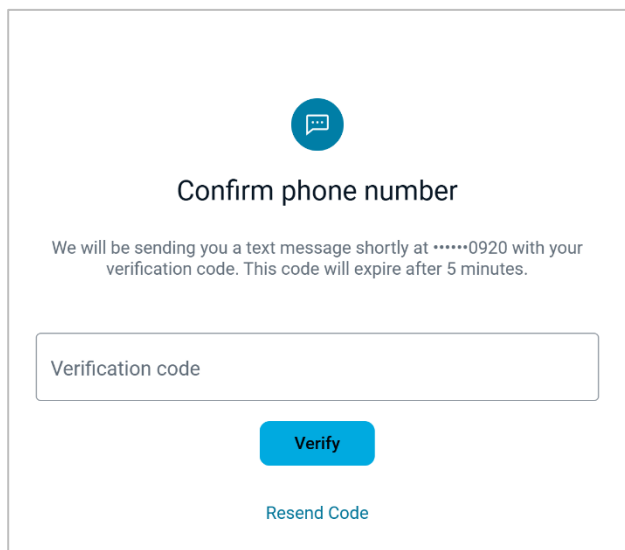
☒ Text message/SMS (2FA program)
Message and data rates may apply.
Reply HELP for help and STOP to opt out.
[SMS terms](#) [Privacy policy](#)

☐ Phone call

Send code

Need help?

8. Enter the verification code sent to the method of your choice. Click **Verify**.
9. Click **Done**.



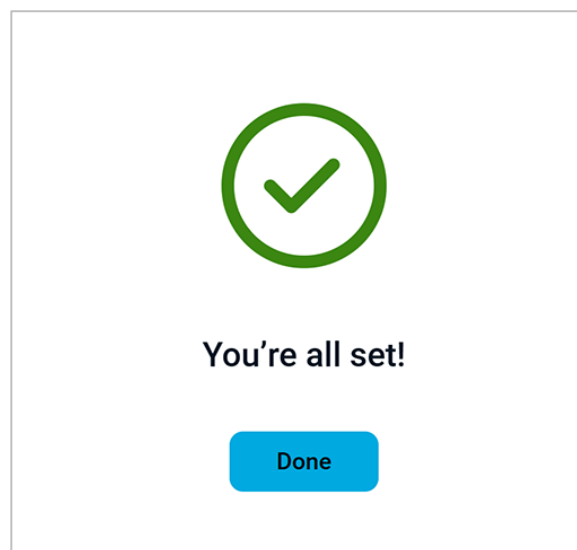
Confirm phone number

We will be sending you a text message shortly at0920 with your verification code. This code will expire after 5 minutes.

Verification code

Verify

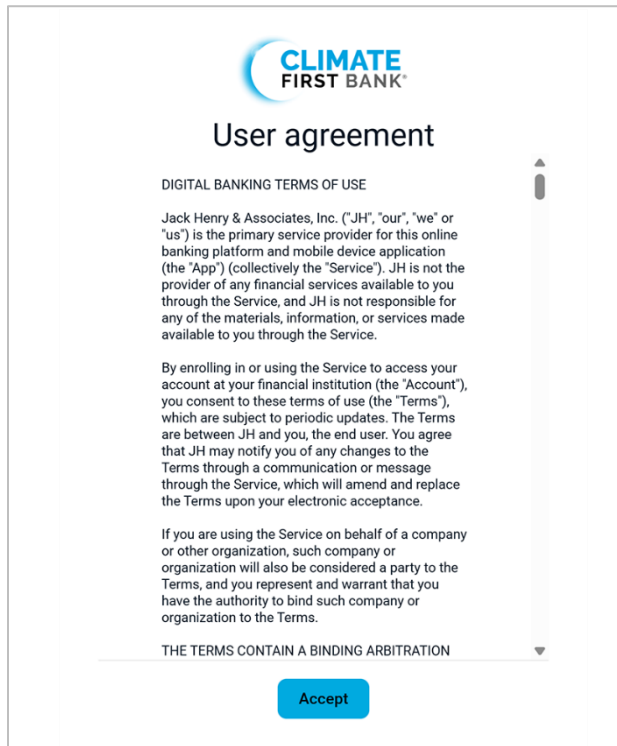
Resend Code



You're all set!

Done

10. Read the Terms and Conditions then click **Accept**.
11. Create your **Username** and **Password**. Click **Next**. You will now be able to log into our site.



The screen displays the Climate First Bank logo at the top. Below it is the title "User agreement" and the subtitle "DIGITAL BANKING TERMS OF USE". The main content area contains three paragraphs of text regarding the terms of service. At the bottom, there is a blue button labeled "Accept".

CLIMATE FIRST BANK®

User agreement

DIGITAL BANKING TERMS OF USE

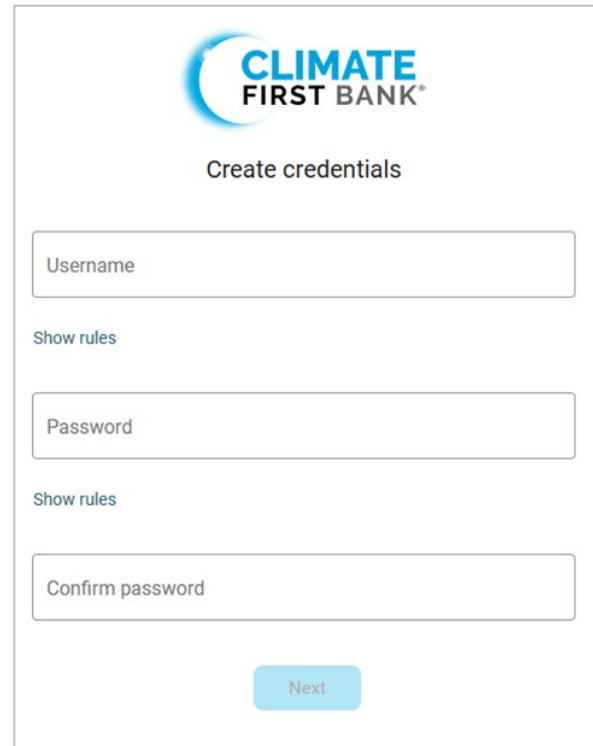
Jack Henry & Associates, Inc. ("JH", "our", "we" or "us") is the primary service provider for this online banking platform and mobile device application (the "App") (collectively the "Service"). JH is not the provider of any financial services available to you through the Service, and JH is not responsible for any of the materials, information, or services made available to you through the Service.

By enrolling in or using the Service to access your account at your financial institution (the "Account"), you consent to these terms of use (the "Terms"), which are subject to periodic updates. The Terms are between JH and you, the end user. You agree that JH may notify you of any changes to the Terms through a communication or message through the Service, which will amend and replace the Terms upon your electronic acceptance.

If you are using the Service on behalf of a company or other organization, such company or organization will also be considered a party to the Terms, and you represent and warrant that you have the authority to bind such company or organization to the Terms.

THE TERMS CONTAIN A BINDING ARBITRATION

Accept



The screen displays the Climate First Bank logo at the top. Below it is the title "Create credentials". There are three input fields: "Username", "Password", and "Confirm password". Each field has a "Show rules" link below it. At the bottom, there is a blue button labeled "Next".

CLIMATE FIRST BANK®

Create credentials

Username

Show rules

Password

Show rules

Confirm password

Next

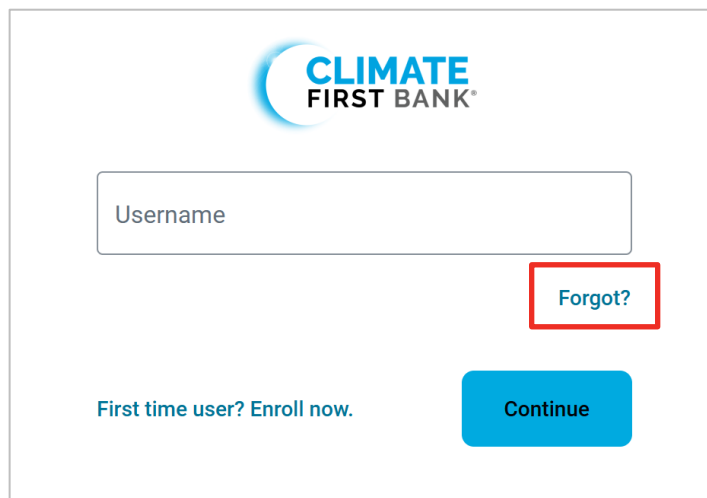
Account Recovery

Use these steps to reset your password and/or retrieve your username.

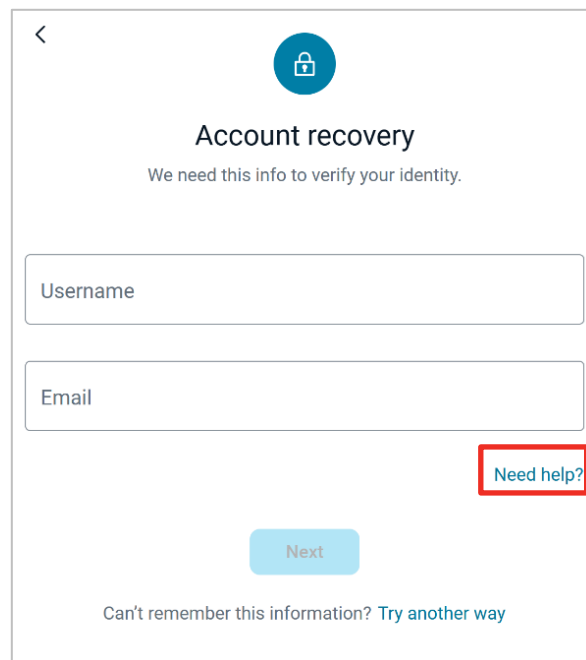
1. Navigate to our website. Click **LOGIN**.
2. Select **Forgot Username or Locked Out or Forgot Password?**
3. Enter your **username** and **email address**.

IMPORTANT: Email must match what is on file.

Don't know your username? Click **Need help?** to use your social security and account number instead.

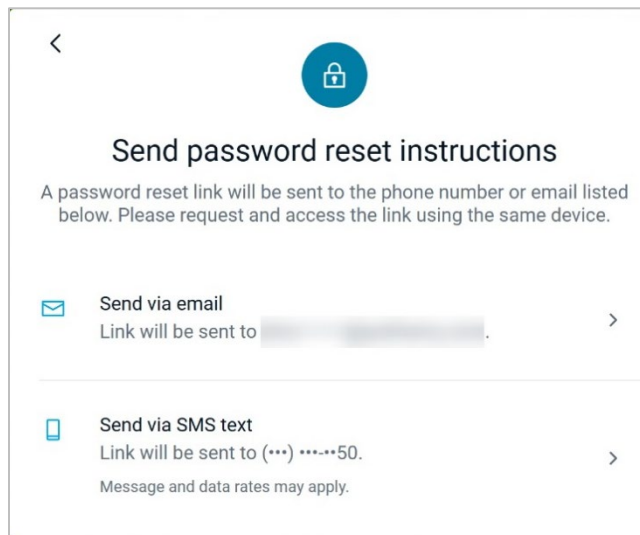


The login screen features the Climate First Bank logo at the top. Below it is a text input field labeled "Username". To the right of this field is a red-bordered button labeled "Forgot?". At the bottom left, there is a link that says "First time user? Enroll now." and at the bottom right is a blue "Continue" button.



The account recovery screen has a back arrow in the top left and a lock icon in a blue circle at the top center. The title "Account recovery" is centered, followed by the text "We need this info to verify your identity." Below this are two text input fields: "Username" and "Email". To the right of the "Email" field is a red-bordered button labeled "Need help?". At the bottom center is a light blue "Next" button. At the very bottom, there is a link that says "Can't remember this information? Try another way".

5. Choose to receive your instructions via email or text.



<



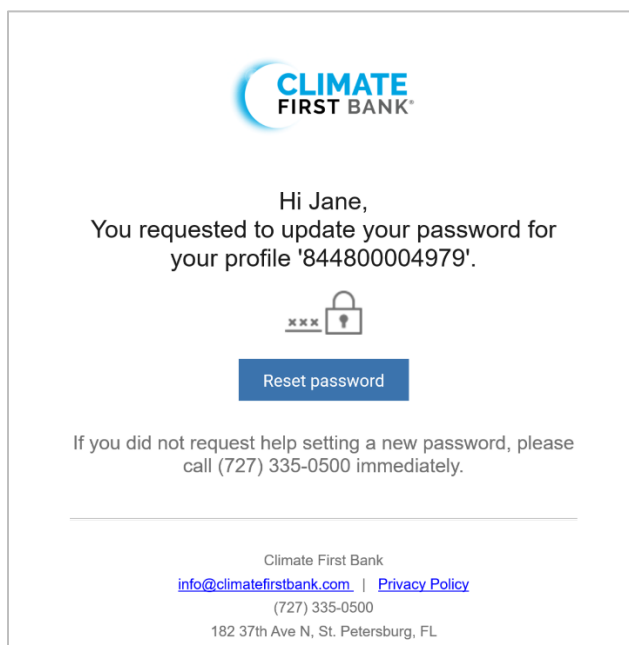
Send password reset instructions

A password reset link will be sent to the phone number or email listed below. Please request and access the link using the same device.

 **Send via email**
Link will be sent to [redacted] >

 **Send via SMS text**
Link will be sent to (***). ***-***50. >
Message and data rates may apply.

6. **Email:** Open your email. Your username will appear in the email body. Click **Reset Password**.
- Text:** Open your text and tap the link.
7. Choose which method to verify your phone number and click **Next**.





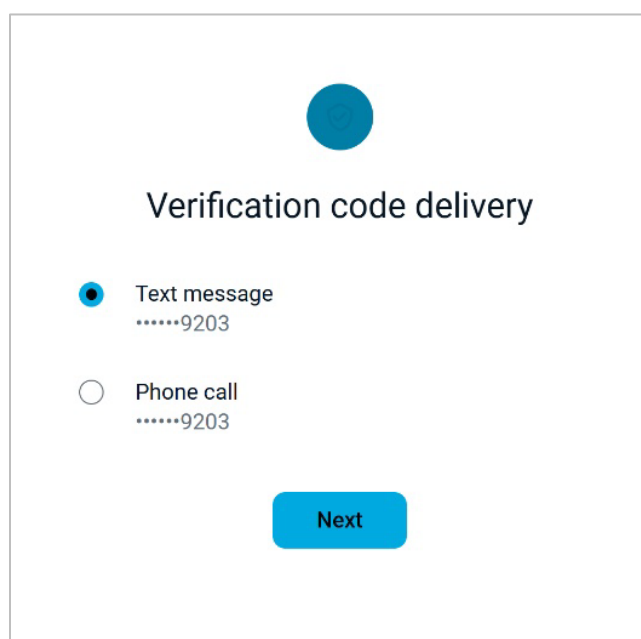
Hi Jane,
You requested to update your password for
your profile '844800004979'.



Reset password

If you did not request help setting a new password, please
call (727) 335-0500 immediately.

Climate First Bank
info@climatefirstbank.com | [Privacy Policy](#)
(727) 335-0500
182 37th Ave N, St. Petersburg, FL





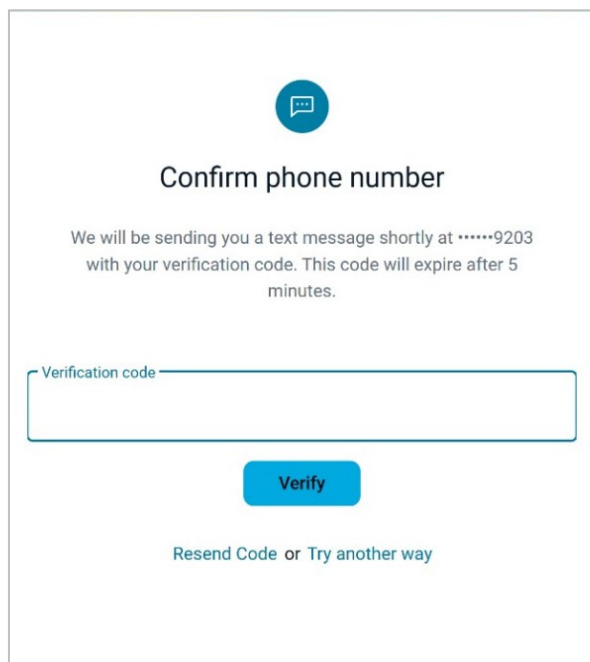
Verification code delivery

☒ **Text message**
.....9203

☐ **Phone call**
.....9203

Next

8. Enter your verification code and click **Verify**.
9. Create a new password and click **Update**.



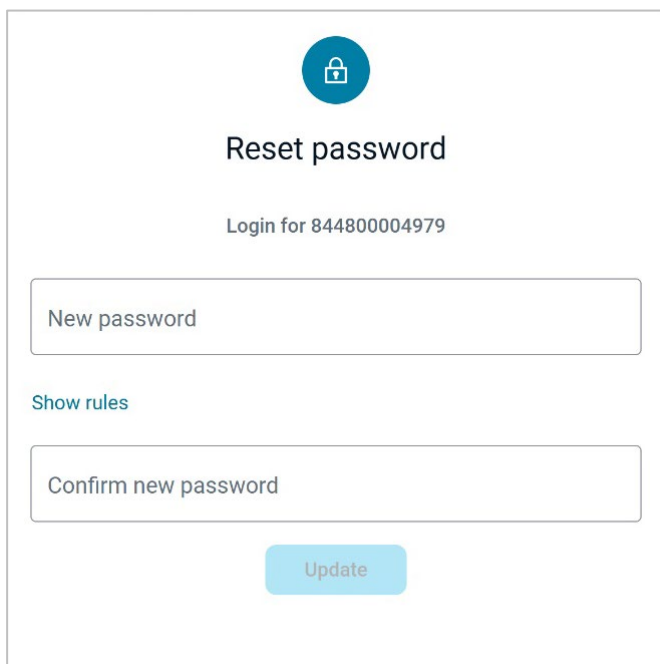
Confirm phone number

We will be sending you a text message shortly at *****9203 with your verification code. This code will expire after 5 minutes.

Verification code

Verify

[Resend Code](#) or [Try another way](#)



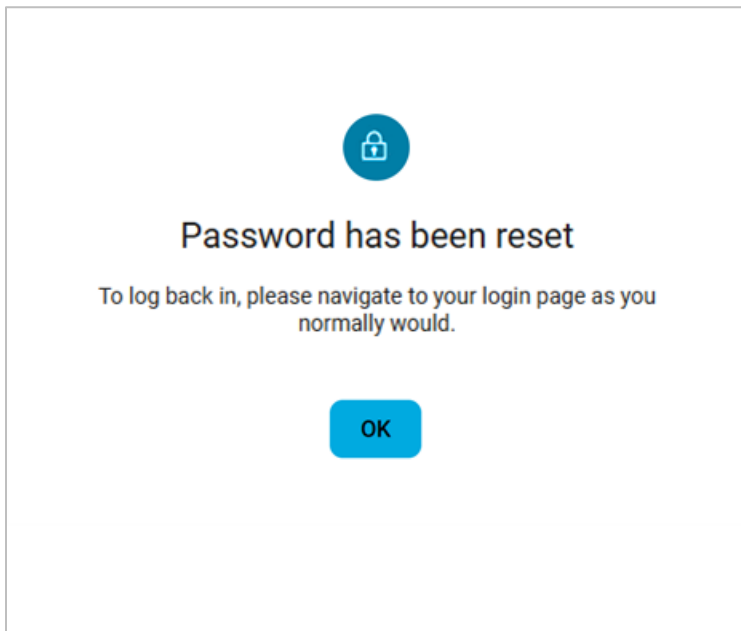
Reset password

Login for 844800004979

[Show rules](#)

Update

10. You may now log in.



Password has been reset

To log back in, please navigate to your login page as you normally would.

OK

Dashboard

This is your landing page where you can access your accounts, review recent activity, and move money.

Default Layout

From left to right, top to bottom.

Navigation menu – Use the left side of the screen to navigate between sections of the website.

User menu (circle) – Access profile, support, settings or sign out.

Accounts – Displays rectangular account boxes showing account name, balance, status, and last four digits of account number.

Ellipses icon – Displays account view settings.

Scroll Buttons – Scroll left or right through your accounts.

View all – View all of your accounts.

Quick Action Buttons – Click a square button to jump to that feature of online banking.

Cards:

Transactions – Displays recent activity on all accounts.

Transfers – Displays scheduled transfers and a quick link to Make a Transfer.

Your Spending Impact – Toggle on values that matter to you to see how your spending aligns and we'll highlight business that match.

Card Management – Displays debit cards that are linked to your accounts. Select a card to toggle it on or off, report it lost or stolen, or reorder.

Explore Businesses – Use the drop down box to select values that matter the most to you and we'll show you businesses that match.

CFB Environmental Impact – Track how many kW of solar CFB has financed.

CFB Social Impact – See how our holdings are invested by category.

Messages – Displays conversations between you and support representatives as well as alerts and bank messages.

Bottom of page:

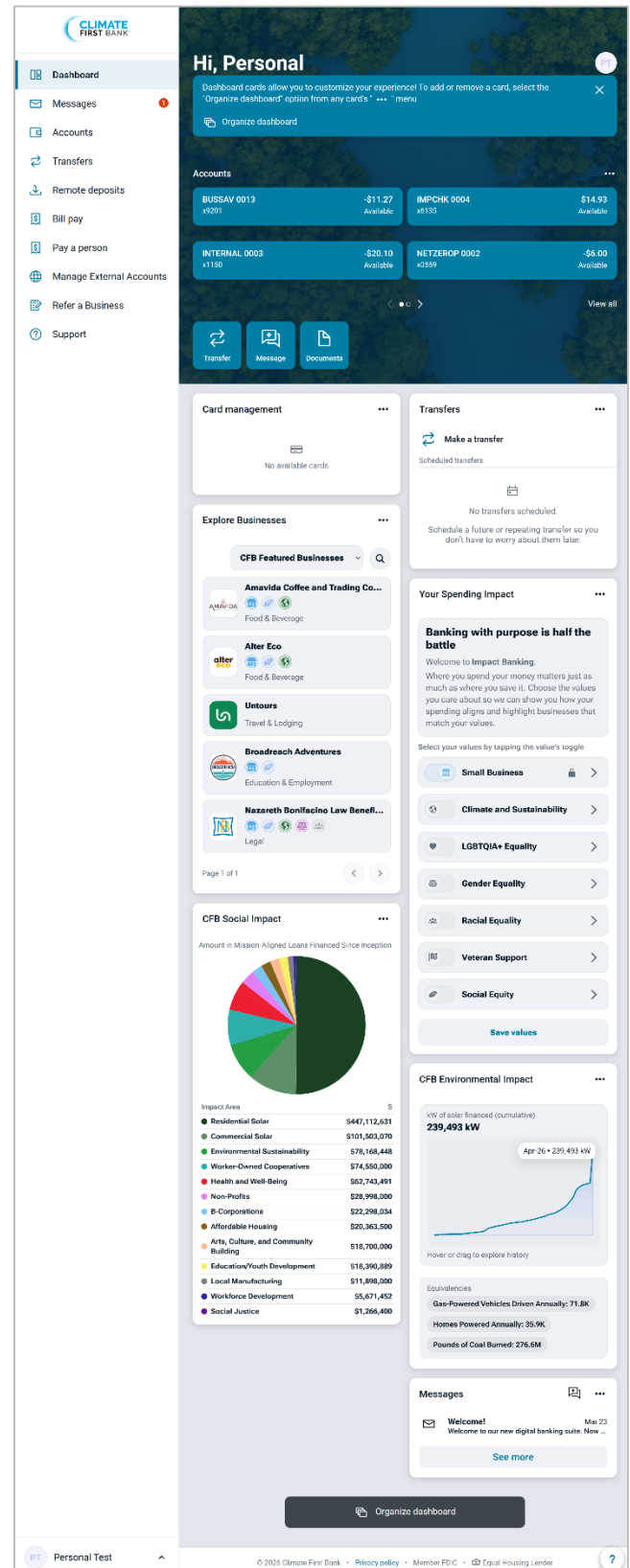
My Profile menu – Access Personal settings, Business management, Account settings or Sign out.

Organize dashboard – Rearrange or show/hide items appearing on your dashboard.

Help (question mark icon) – Access the help menu.

Additional Available Cards:

Under *Organize Dashboard* click **+ Add a card**.



Remote Deposits – Conveniently add funds by taking photos of your check.

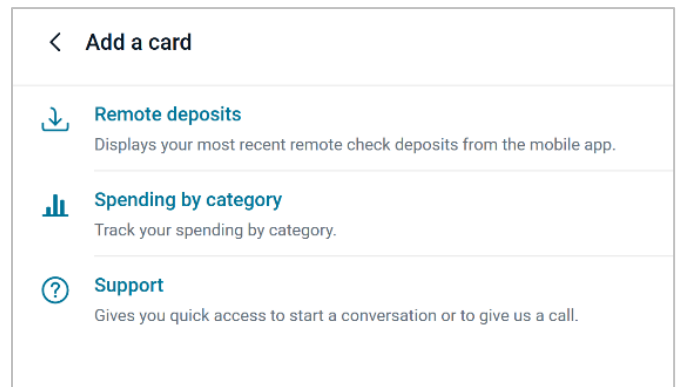
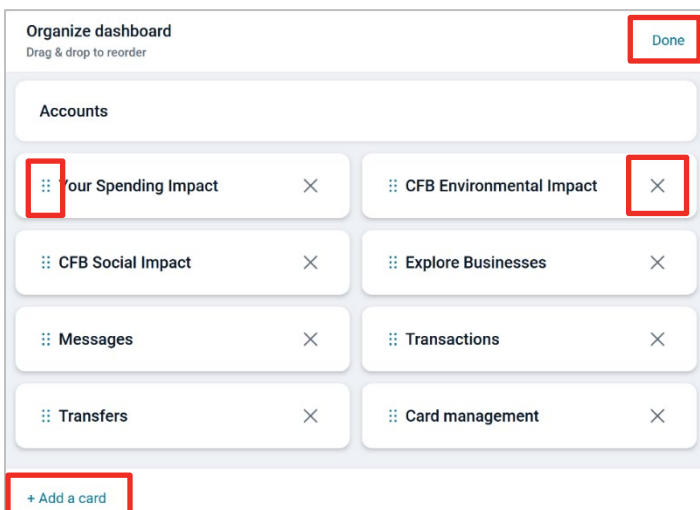
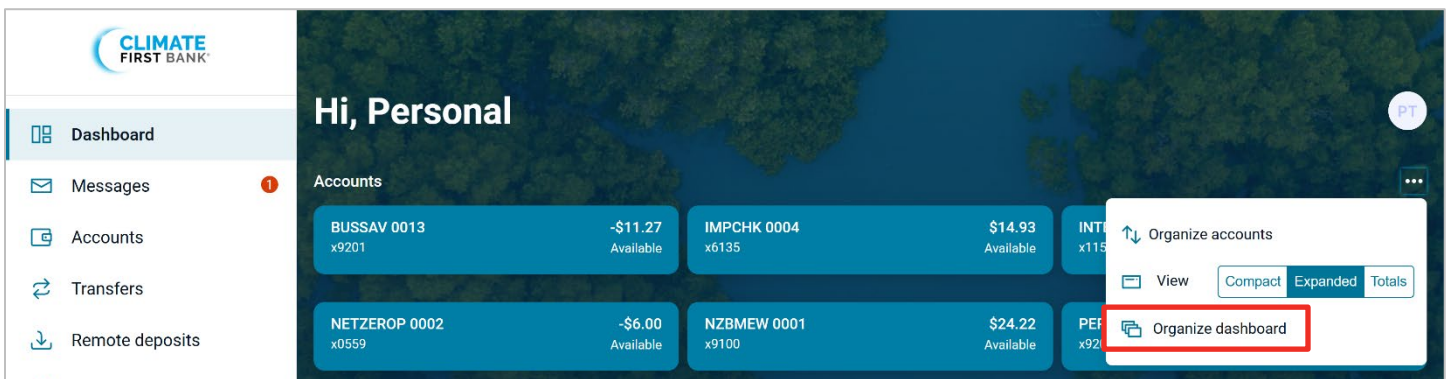
Spending by category – Track your spending by category.

Support – Displays information about the institution and provides multiple ways to contact the bank for support.

Organize Dashboard

Use this feature to **add**, **remove**, or **reorder** the cards on the dashboard.

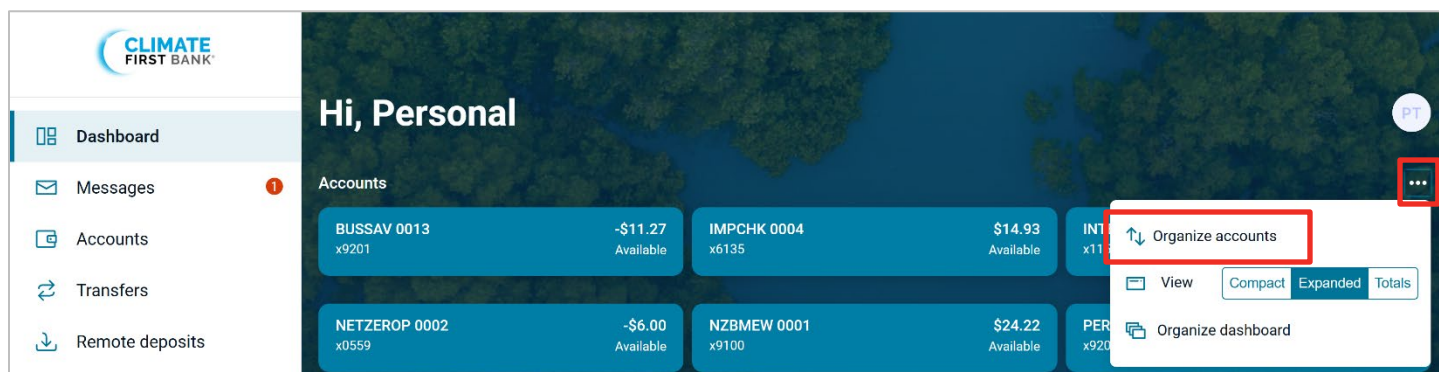
1. Click **Organize Dashboard** either at the ellipsis menu or at the bottom of the page.
2. Click and hold the **6 dot icon** to drag and drop the cards to the order you prefer.
3. Click the **X** to remove a card from the dashboard.
4. Click **+ Add a card** to browse available cards that may be added to the Dashboard. Select any you'd like to appear and click **<** when finished.
5. Click **Done** once the layout suits your needs.



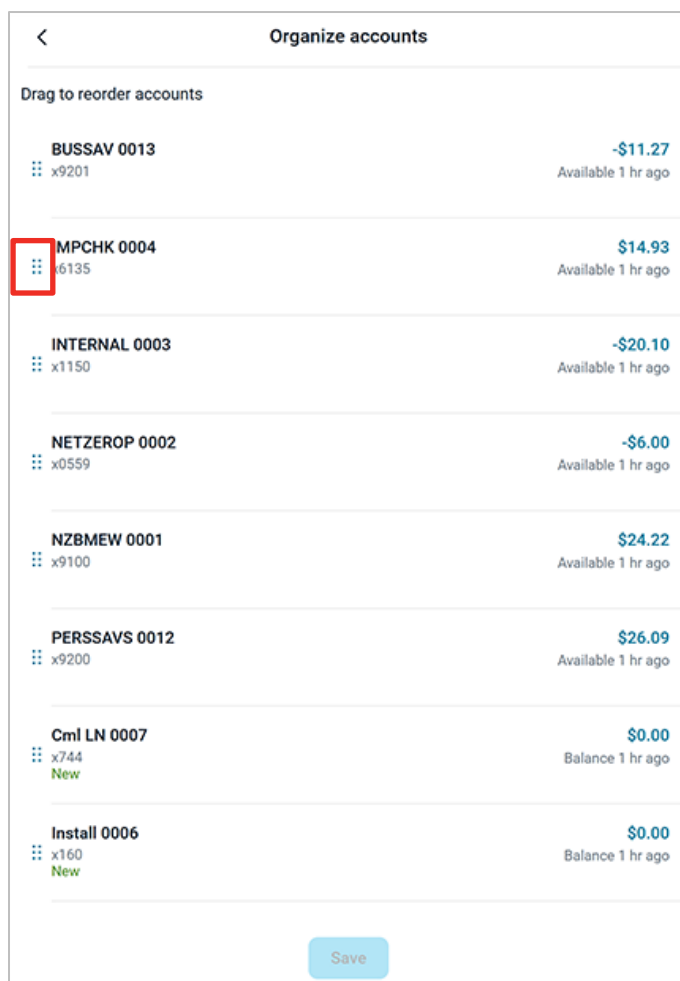
Organize Accounts

Use this feature to change the order of your accounts on the dashboard or update how the account information is displayed.

1. Click the **ellipsis icon** next to the **Accounts** section, then select **Organize accounts**.



2. Click and hold the **6 dot icon** to drag and drop an account to the order you prefer.
3. Click **Save**.

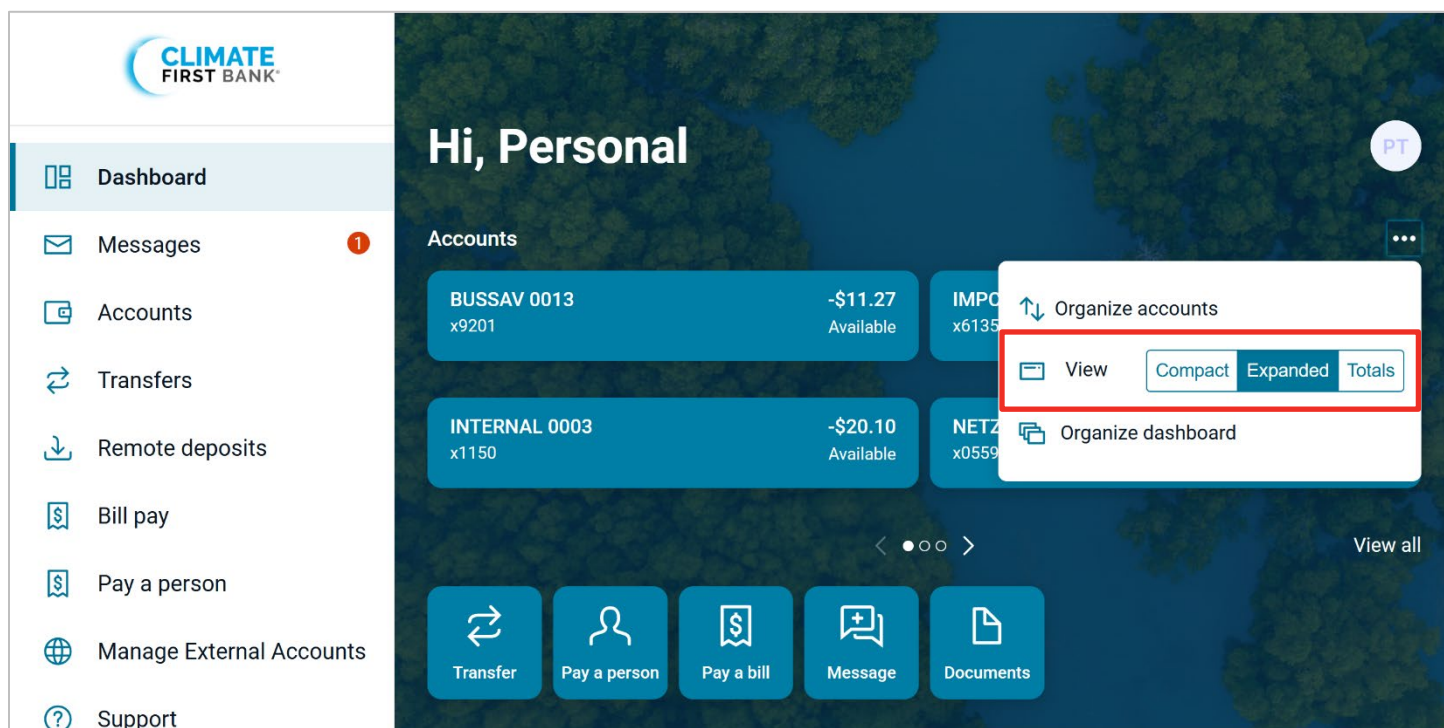


Account View

Use this feature to change what account information is displayed on the dashboard.

Click the ellipsis icon next to the **Accounts** section choose from one the **View** options:

- **Compact:** Displays accounts in a single row. Only three accounts will appear at a time.
- **Expanded:** Displays accounts in two rows. Up to six accounts will appear at a time.
- **Totals:** Groups accounts together based on type such as Cash, Borrowed, Credit Balance, and Investments. Displays the total balance for all accounts in each group.

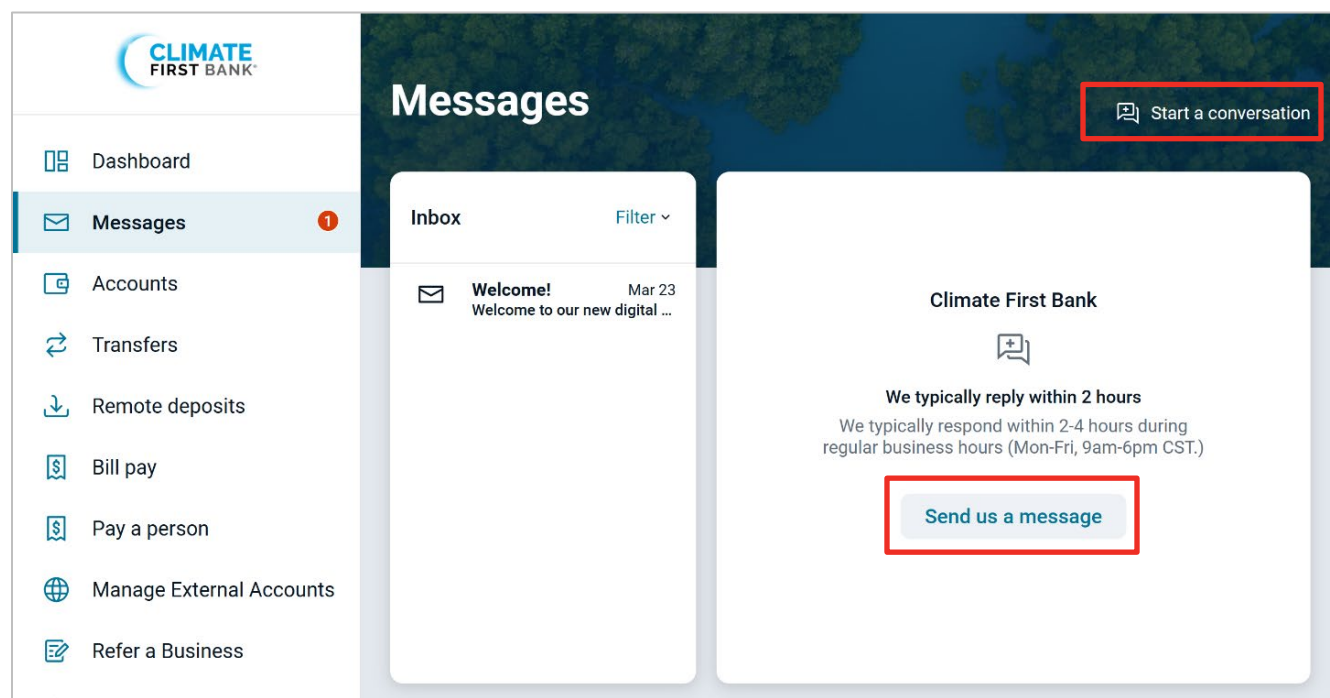
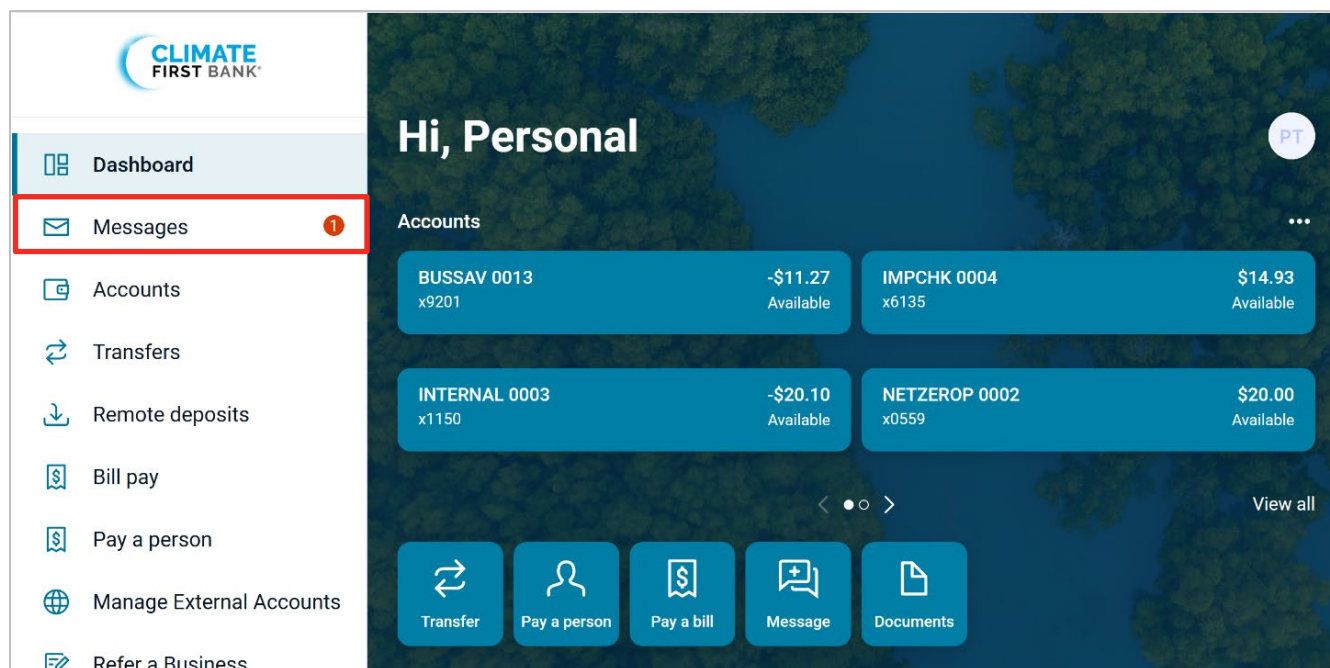


Messages

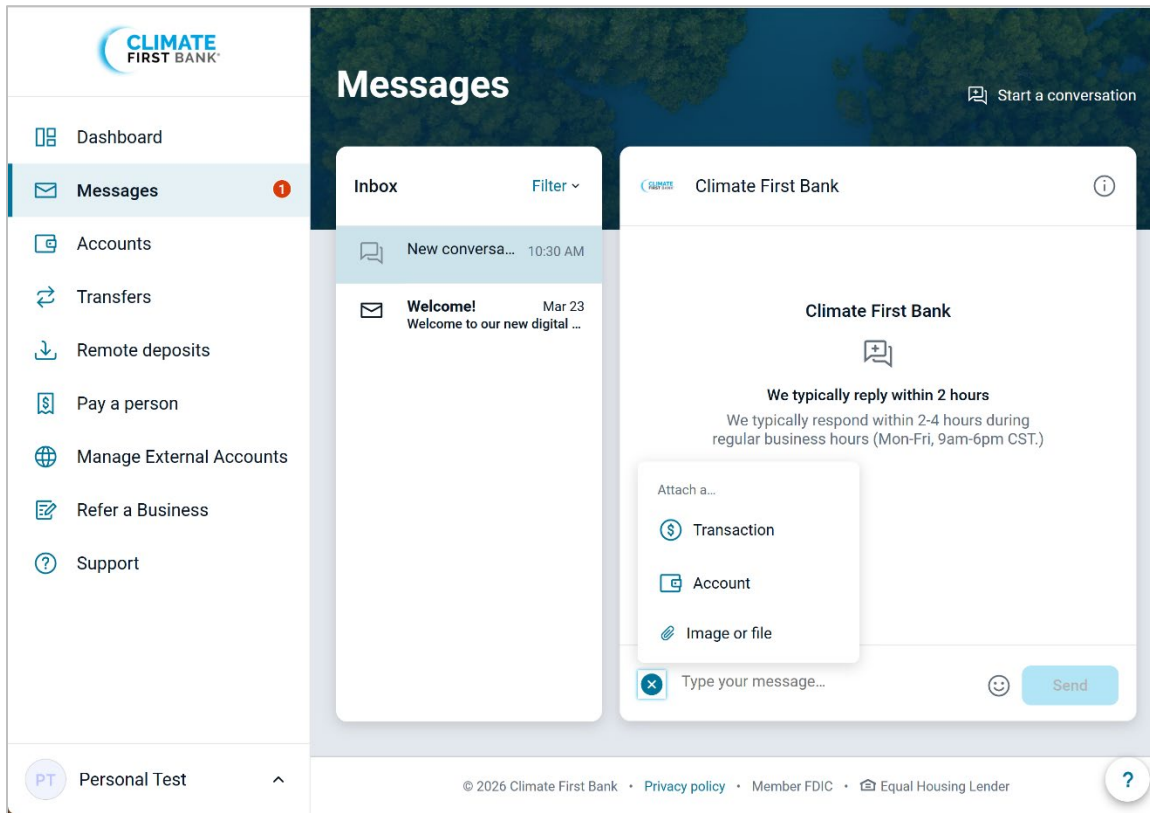
Use this module to start a conversation with the institution, review alerts, and access informational messages from the institution.

Start a Conversation

1. Select **Messages** from the navigation pane or navigate to the **Messages** card on the Dashboard and click the **Start a Conversation** icon.

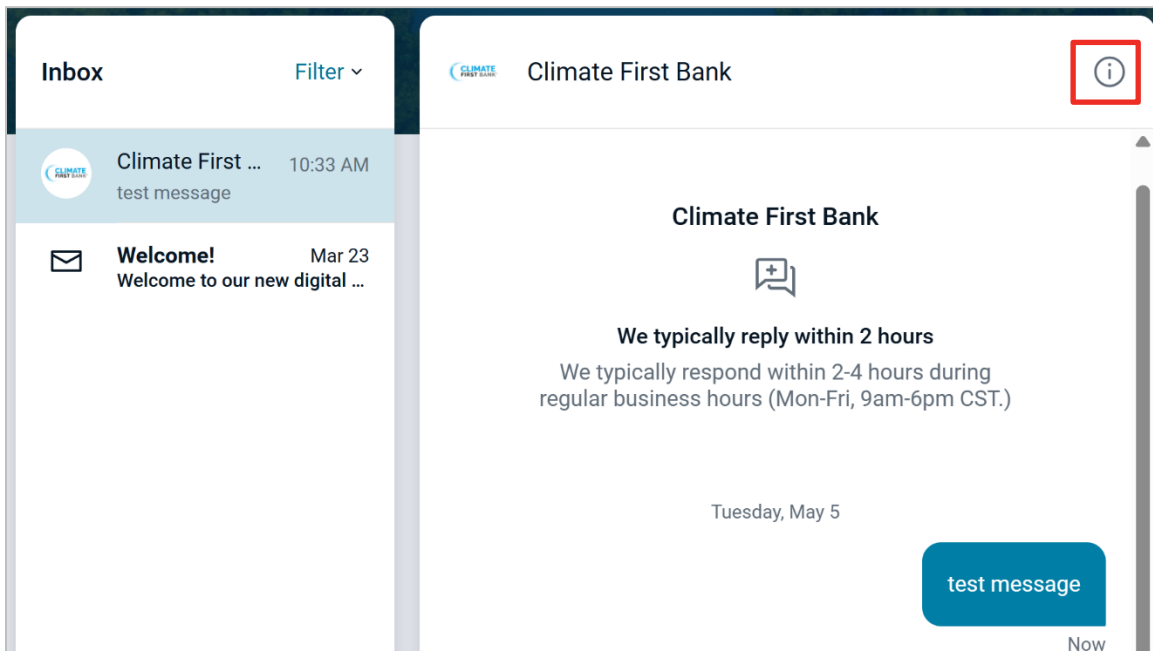


2. Type your message in the field. Click the **+** to add transaction or account details to your message. You can also attach images or other files.
3. Click **Send** when done.



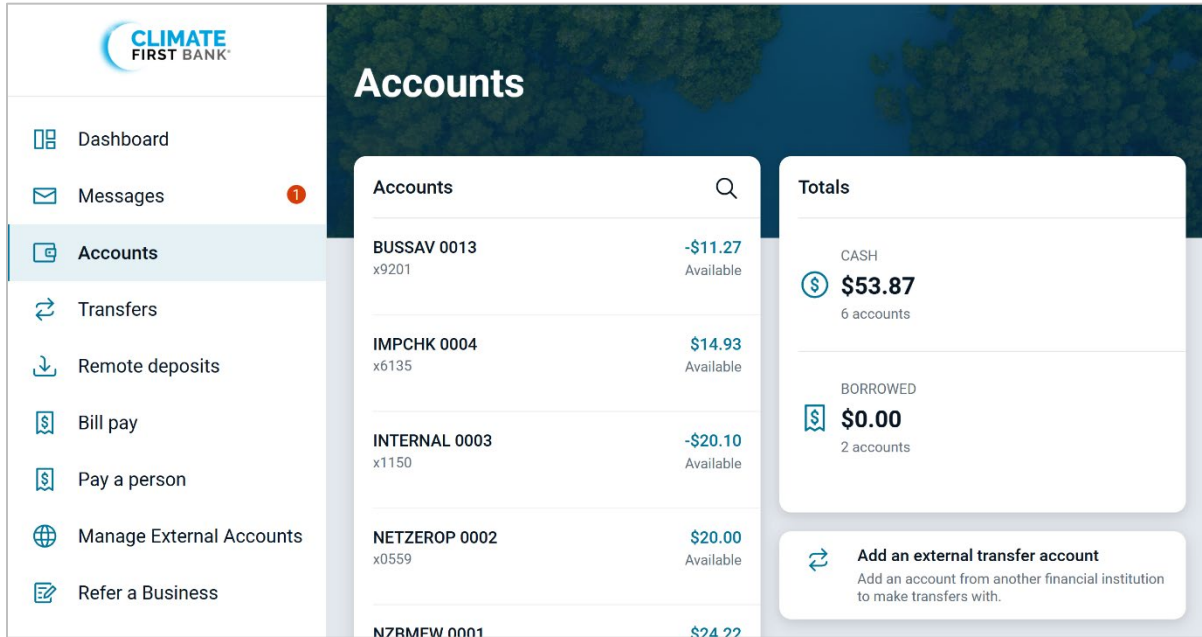
Close/Delete a Message

Click the **i** to close a conversation. Closing a conversation deletes it.



Accounts

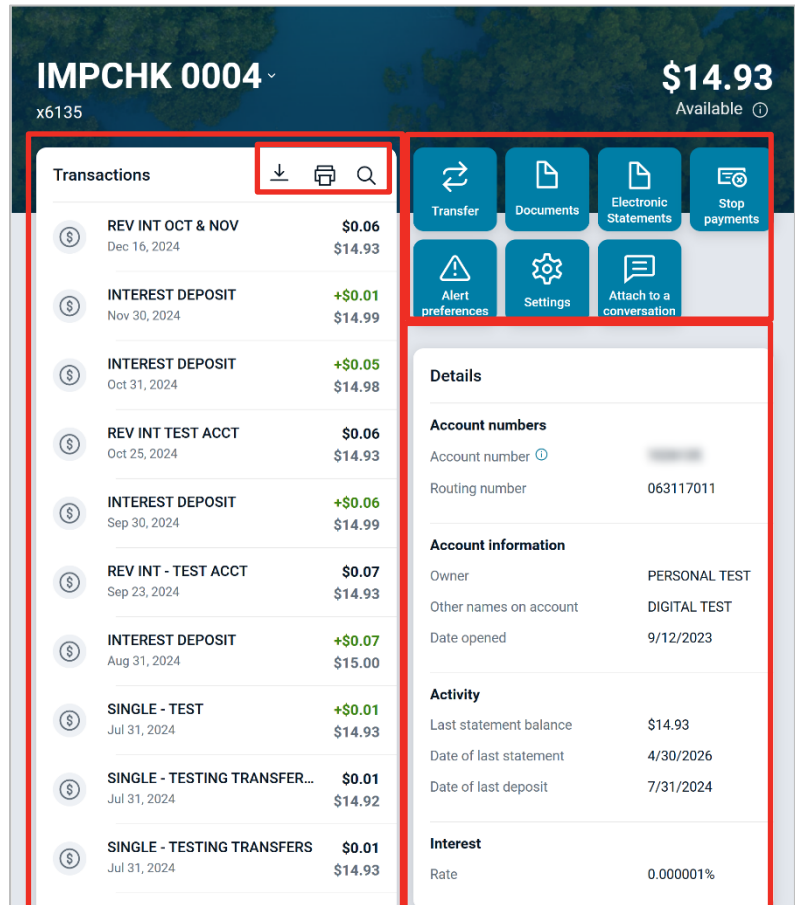
Select **Accounts** to see a listing of all the accounts tied to your online banking ID.



Account Information

Select an account from the **Accounts** page or from the **Dashboard**.

- **Transactions** card - View recent account activity.
 - Click the **Download** icon to download into CSV, TXT, OFX, QBO or QFX format.
 - Use the **Printer** icon to print.
 - Use the **Search** icon to filter transaction activity.
- Use the rectangular **Quick Action Buttons** to quickly access other features for this account.
- Use the **Details** card to review account details such as account and routing numbers, account owners, important dates, and interest rates.



Transaction Details

On the Account home screen, select a transaction to view additional information.

- Click **Add tags** to categorize the transaction.
- Click **Add notes** to include details to accompany the transaction description.
- Click the + under *Add images* to add an image such as an invoice or receipt, or click the icon (if available) to review check images.
- Click **Attach to a conversation** to attach transaction details to a conversation that can be sent to support or another user at your company.

Transaction details

REV INT OCT & NOV

\$0.06

12/16/2024

Add tags

Add notes

Add images

+

Attach to a conversation

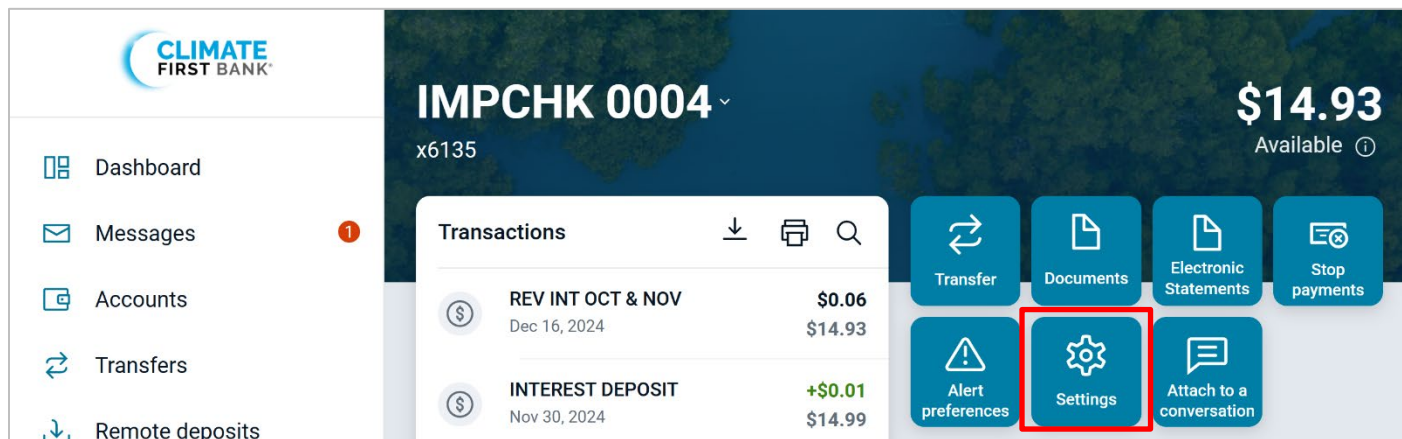
Climate First Bank - IMPCHK 0004

REV INT OCT & NOV

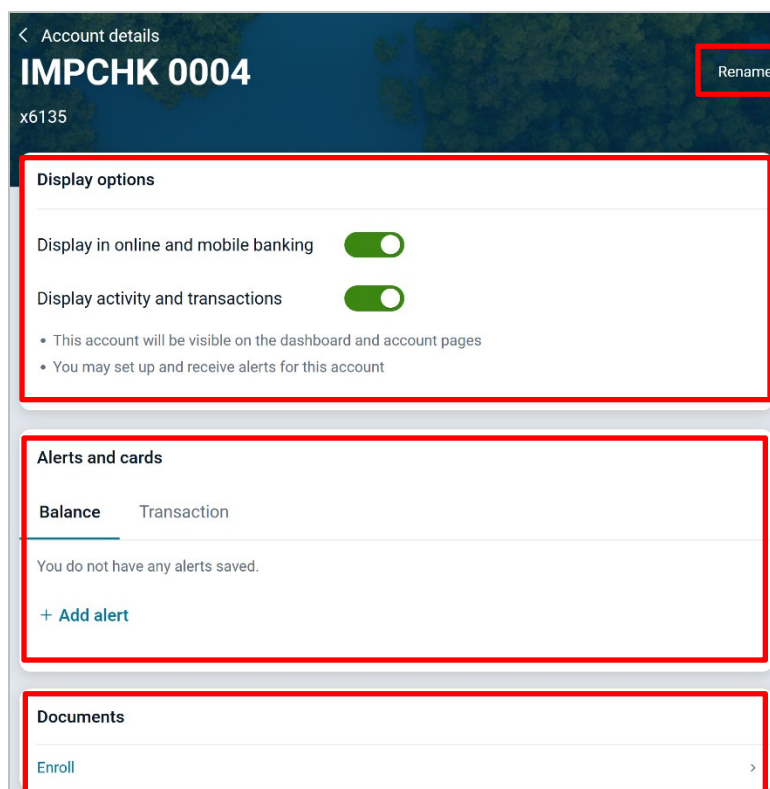
Transaction category information is automatically generated.

Account Settings

Change how the account appears within online banking, update preferences, and manage alerts. From within the account, select an account to manage, then select **Settings**.



- **Rename** - Change the nickname of the account.
- **Display options** - Choose to display the account and/or activity in online banking.
- **Alerts and cards** - Add or modify alerts.
- **Documents** - Enroll in eStatements.

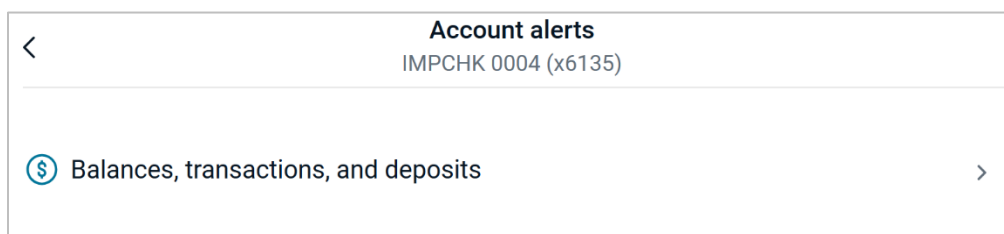
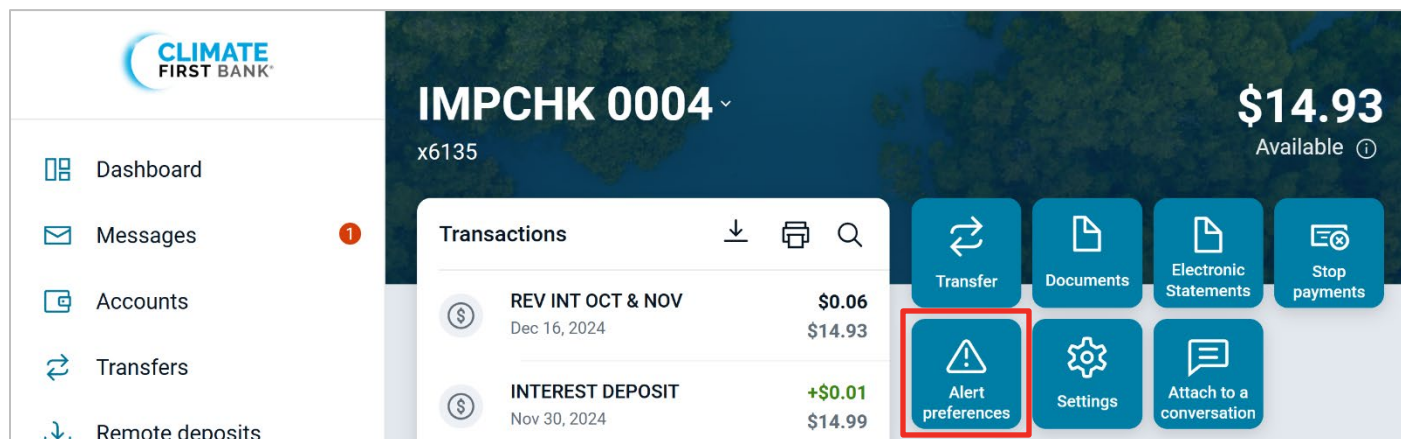


Alerts

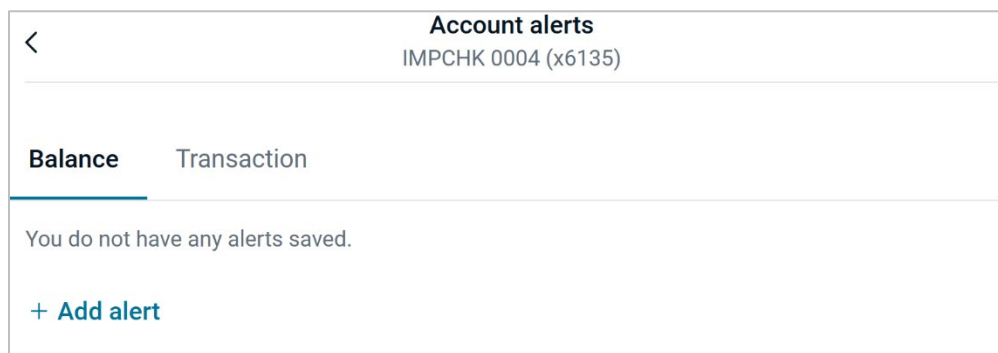
Set up alerts to be notified about your balance or certain transactions.

Set up Balance and Transaction Alerts

1. Select an account and click **Alert Preferences**.
2. Select **Balances, transactions, and deposits**.



3. Choose the appropriate **Balance** or **Transaction** tab to add your new alert to.
4. Click **+ Add alert**.



5. Complete the details and select how you'd like to receive the alert.
6. Click **Add alert**.

<

Account alerts

IMPCHK 0004 (x6135)

Balance

Transaction

You do not have any alerts saved.

Notify me when my balance is :

over

\$

100

Notify by:

☐ Text

☐ Email

☒ In-App Message

Need to update your contact information?

Cancel

Add alert

Edit or Delete a Balance and Transaction Alert

1. From within the account, click **Alert Preferences**.
2. Select **Balances, transactions, and deposits**.

CLIMATE FIRST BANK®

Dashboard

Messages

Accounts

Transfers

Remote deposits

IMPCHK 0004

x6135

\$14.93

Available ⓘ

Transactions

REV INT OCT & NOV

Dec 16, 2024

\$0.06

\$14.93

INTEREST DEPOSIT

Nov 30, 2024

+\$0.01

\$14.99

Transfer

Documents

Electronic Statements

Stop payments

Alert preferences

Settings

Attach to a conversation

<

Account alerts

IMPCHK 0004 (x6135)

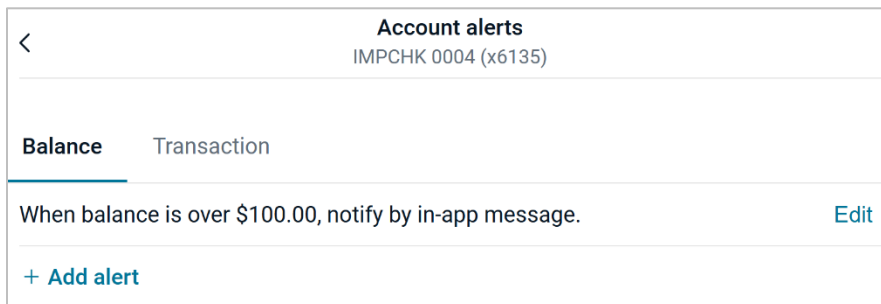
\$

Balances, transactions, and deposits

>

3. Toggle between **Balance** and **Transaction** tabs to find the alert to modify or delete.

4. Select **Edit**.



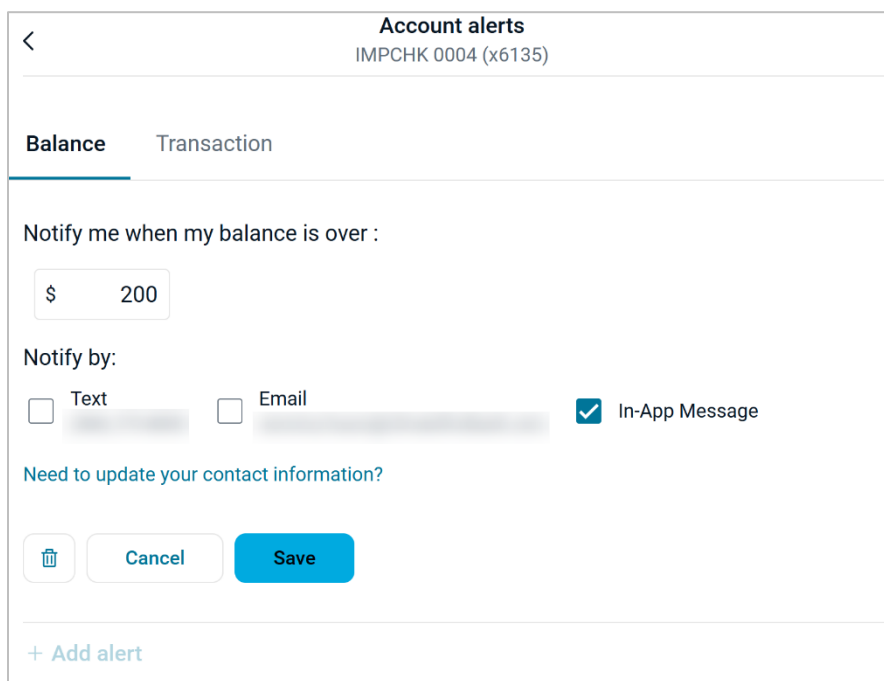
Account alerts
IMPCHK 0004 (x6135)

Balance Transaction

When balance is over \$100.00, notify by in-app message. [Edit](#)

[+ Add alert](#)

5. Modify the details.
6. Click **Save** or click the **trash can** icon to delete.



Account alerts
IMPCHK 0004 (x6135)

Balance Transaction

Notify me when my balance is over :

\$ 200

Notify by:

☐ Text ☐ Email ☒ In-App Message

[Need to update your contact information?](#)

 [Cancel](#) [Save](#)

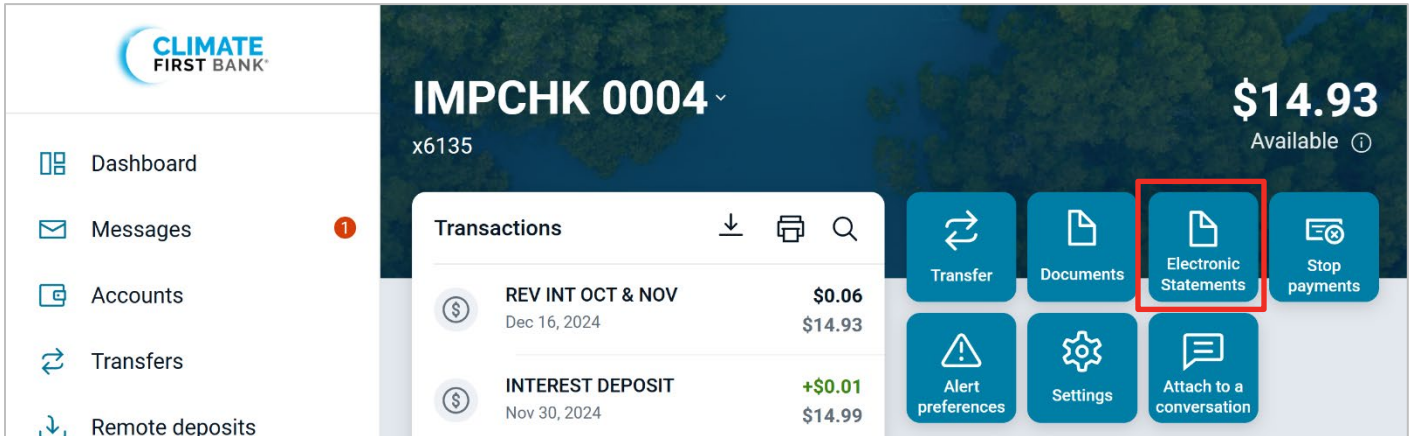
[+ Add alert](#)

eStatements

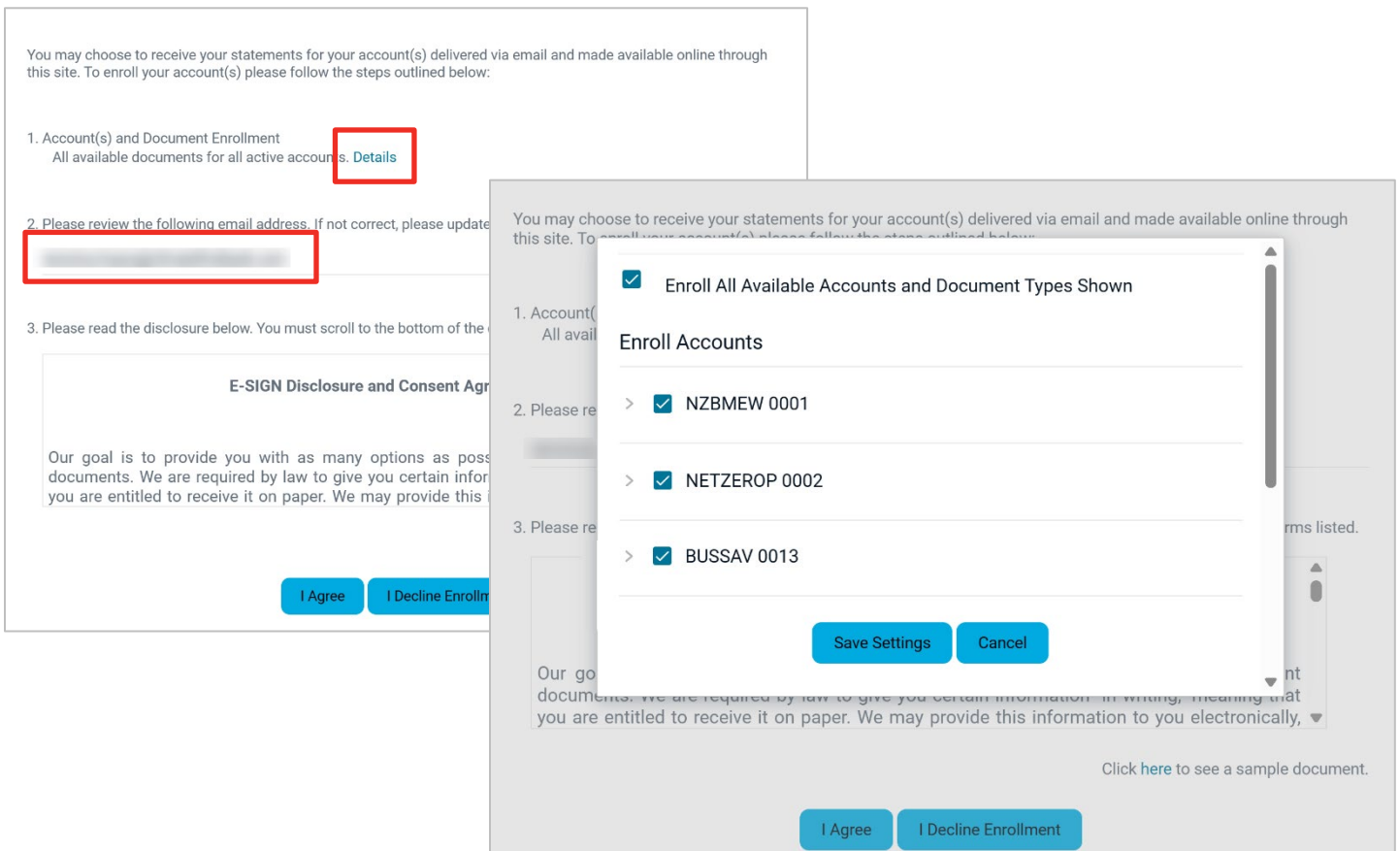
Enroll in eStatements to stop paper documents from being mailed. You will receive an email when your electronic document is available to view. eStatements are available online for 18 months.

eStatement Enrollment

1. Click **Electronic Statements** from the Accounts page or the Dashboard.

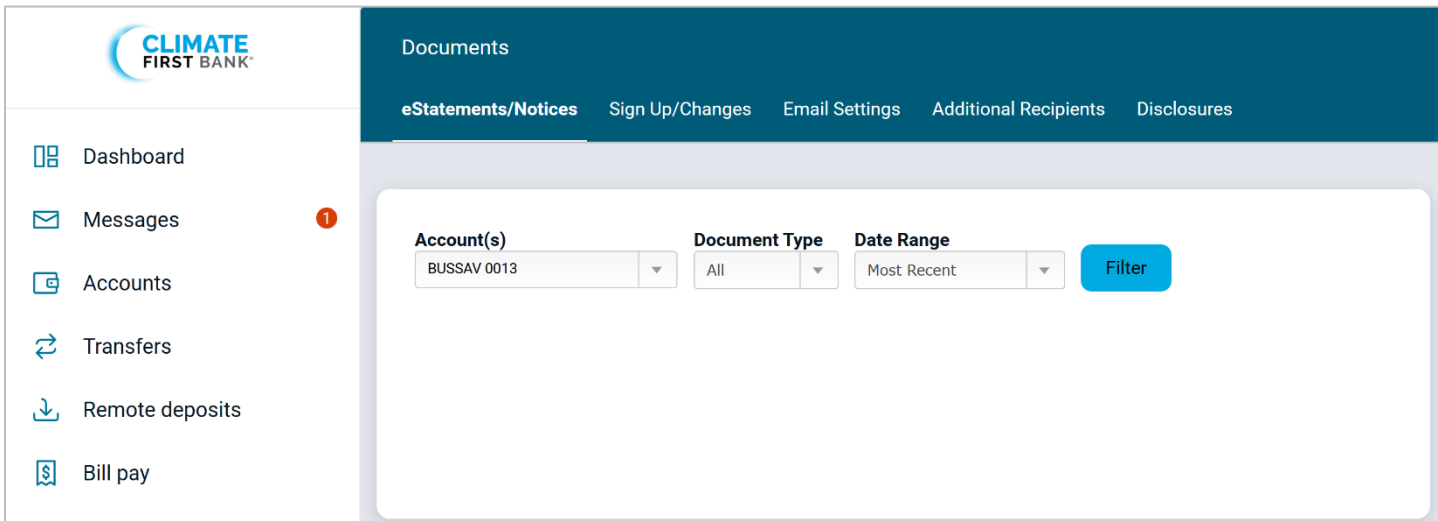


2. Click **Details** to specify which accounts should be enrolled, then scroll down and click **Save Settings** at the bottom of the screen.
3. Review the email address, and agree to the Terms and Conditions.

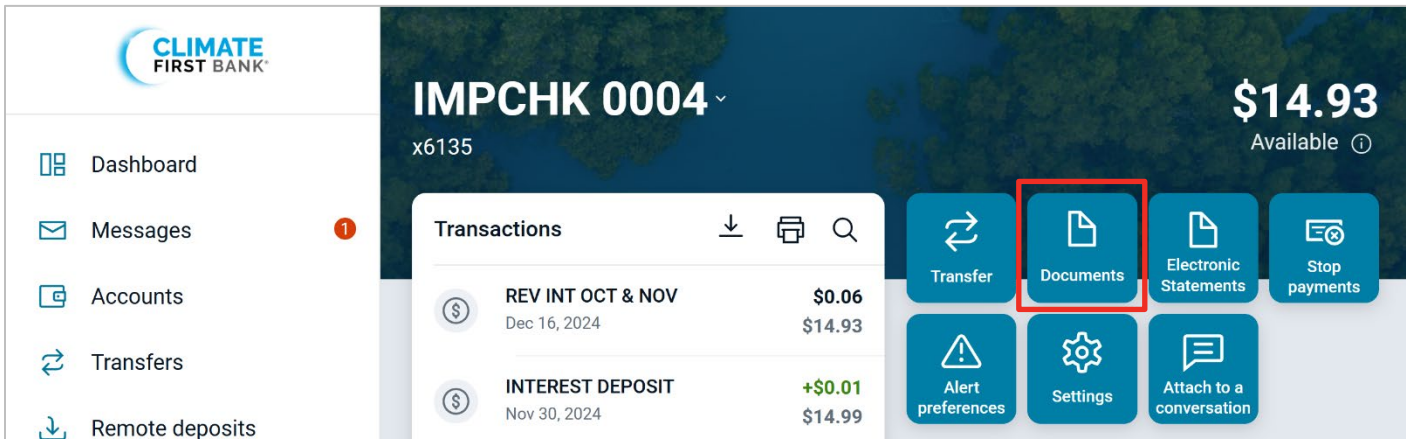


Download eStatements and Notices

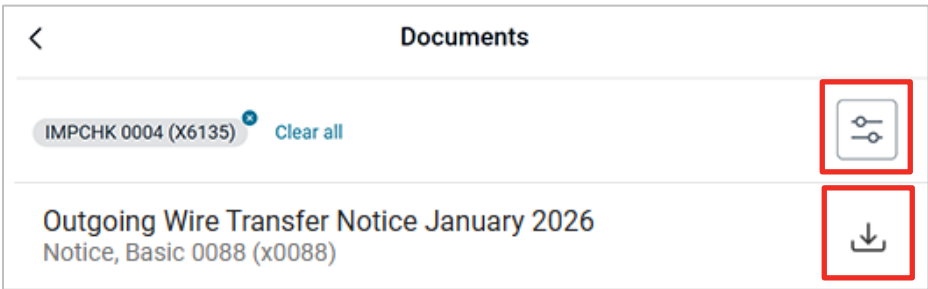
- 1. Select a document to download and view. You can use the **Filter** to change the type of document, date range, and account.

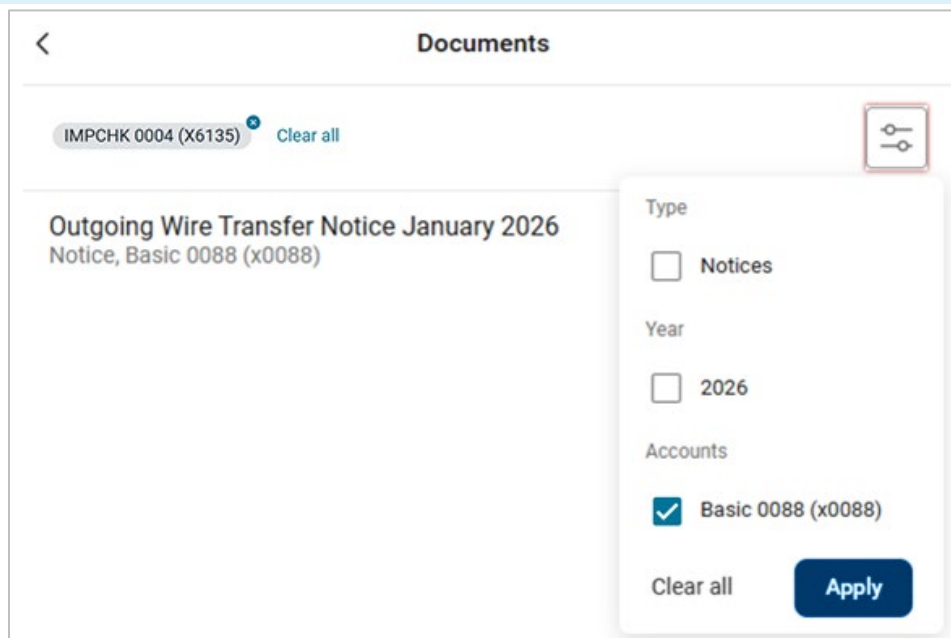


- 2. You may also click **Documents** from the Account screen to view notices.



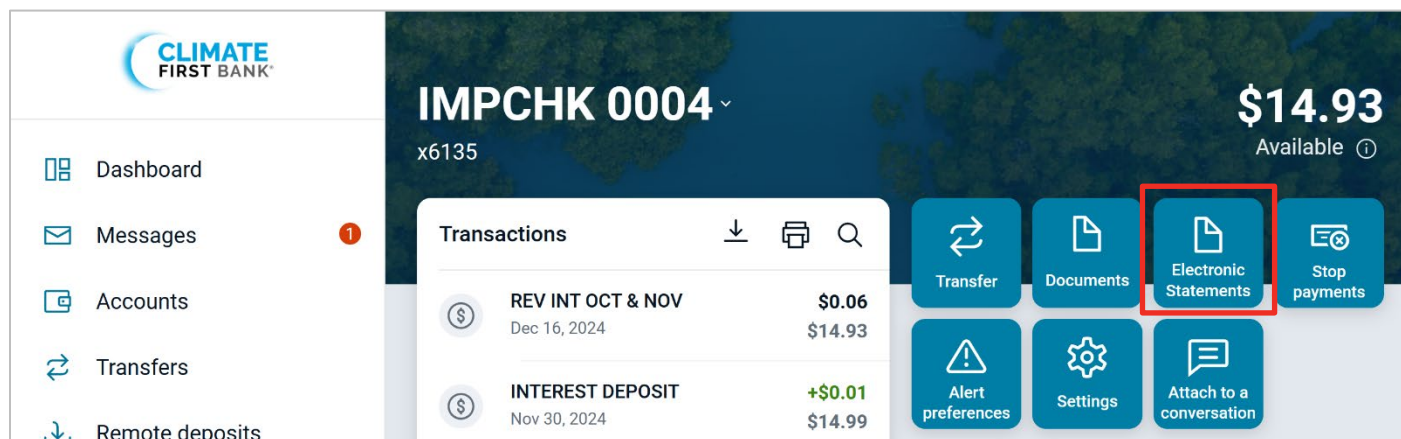
- 3. Click the **Filter** icon to define your parameters and click **Apply**. Click the **Download** icon to download your desired documents.





eStatement Enrollment Changes

Need to make changes to your eStatement enrollment?
Click **Electronic Statements** on your account page.



- Select **Sign Up/Changes** to update your account enrollment.
- Select **Email Settings** to change the email the documents will be sent to.
- Select **Additional Recipients** to set up an additional person to receive eStatements on your accounts.
- Select **Disclosures** to view/print the eStatements legal information.

Documents

eStatements/Notices

Sign Up/Changes

Email Settings

Additional Recipients

Disclosures

Instructions: Below is a list of accounts and document types that are available for enrollment in electronic delivery. You may place a check next to any document you wish to enroll or place a check next to any account(s) in which you wish to enroll all documents. If you uncheck any document or account, you will be unenrolled in electronic delivery for those applicable documents and/or accounts. No selections will be saved until you select the "Save Settings" button.

☒ Enroll All Available Accounts and Document Types Shown

Enroll Accounts

>

☐ INTERNAL 0003

>

☒ IMPCHK 0004

>

☐ Cml LN 0007

>

☐ BUSSAV 0013

Save Settings

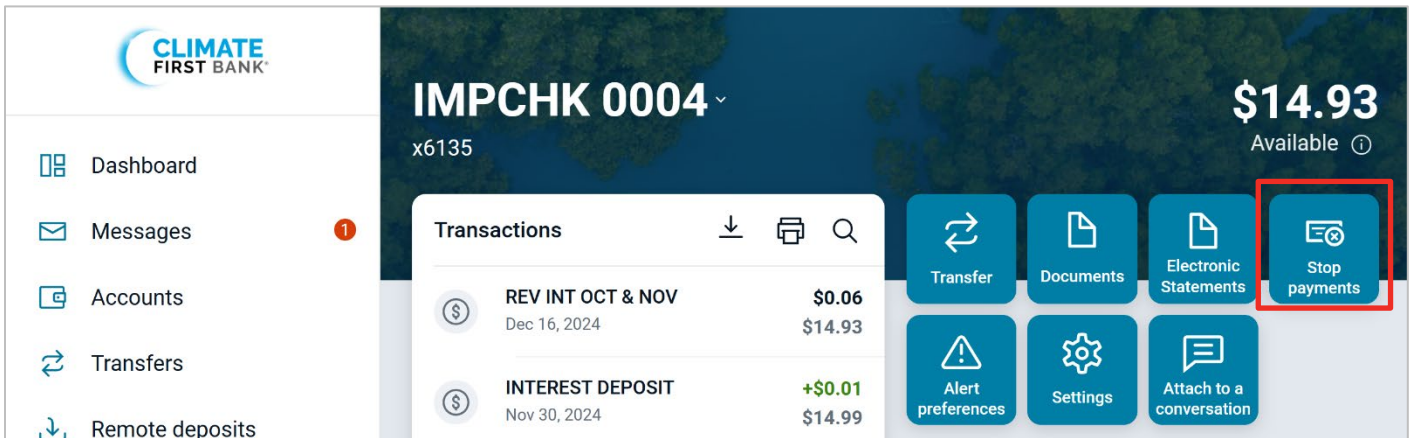
Refresh

Stop Payments

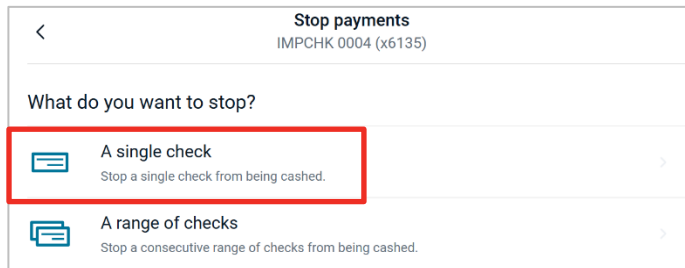
You have the option to place a Stop Payment on either a single check or a range of checks. The Stop Payment Service Fee is displayed before finalizing the request. The stop remains active for six months, after which the payment(s) may proceed as normal. If you need assistance, wish to cancel a Stop Payment before the six-month period ends, or need to stop an ACH or recurring debit card transaction, please reach out to the bank by phone or through a Secure Message.

Place Stop Payment on a Single Check

1. Select an account and click **Stop payments**.



2. Choose **A single check**.

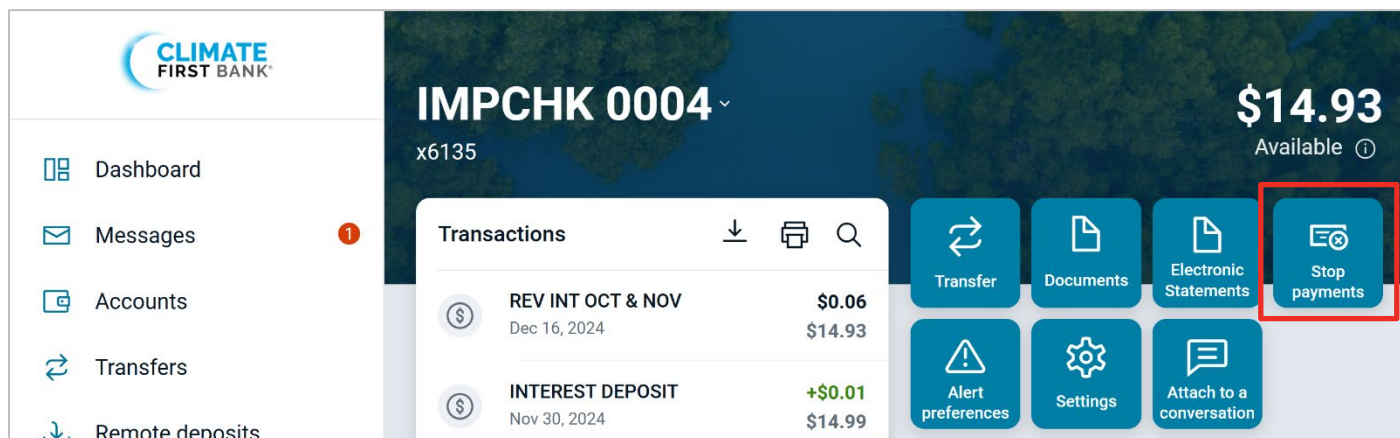


3. Complete the details and click **Submit**.

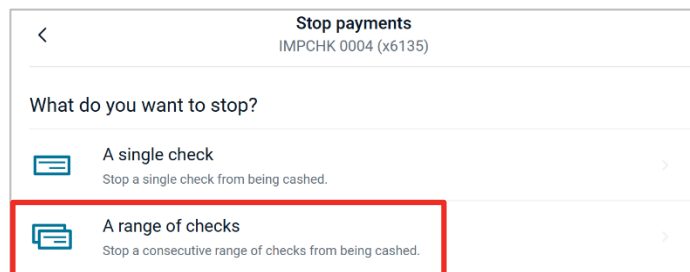
This screenshot shows the form for completing a single check stop payment. The title is 'Stop payments' for account 'IMPCHK 0004 (x6135)'. The form fields are: 'Check #' (empty), 'Check date' with a 'Select' dropdown, 'Payee' (empty), 'Optional' section containing 'Check amount' (empty) and 'Reason' with a 'Select' dropdown. A 'Submit' button is at the bottom right.

Place a Stop Payment on a Range of Checks

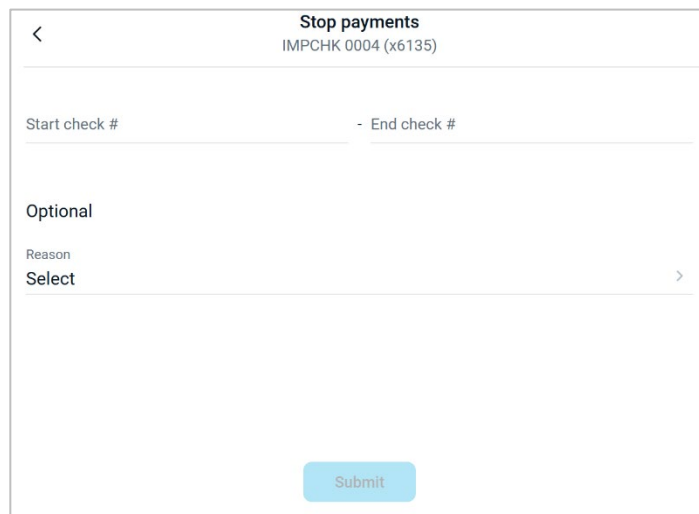
1. Select an account and click **Stop payments**.



2. Choose **A range of checks**



3. Complete the details and click **Submit**.

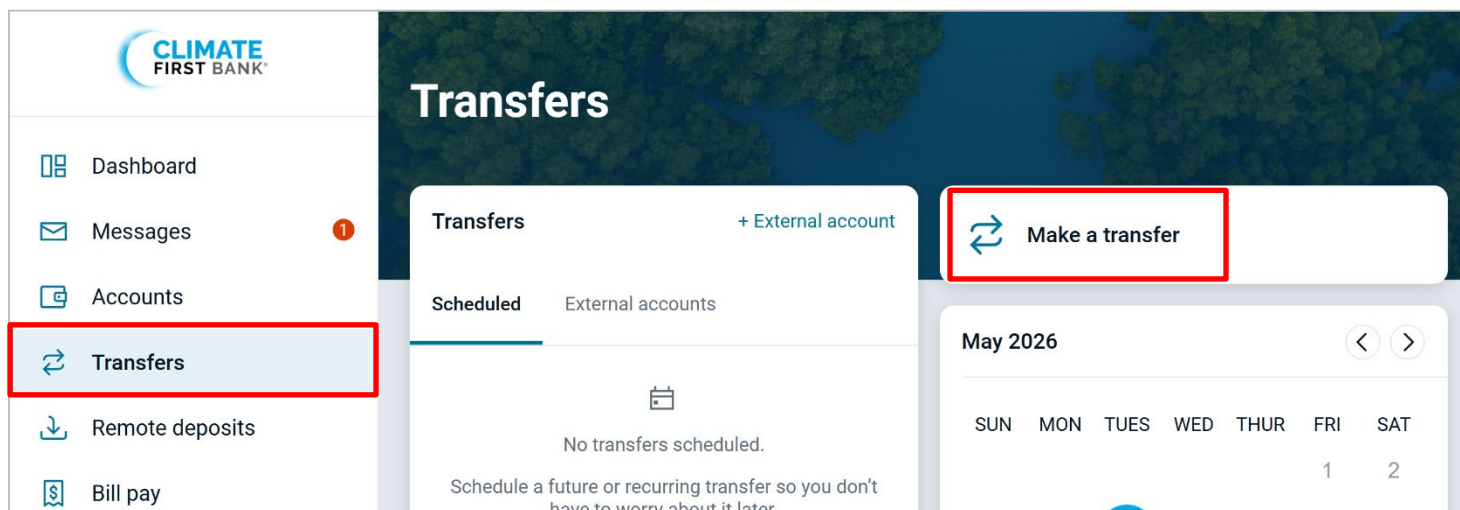


Transfers

Move money between internal accounts.

Submit a Transfer

1. From the **Dashboard**, click **Transfers** on the left hand menu then click **Make a Transfer** from the **Transfers** page. You may also click **Transfer** from the Dashboard **Quick Action** buttons.



2. Select your **From** and **To** accounts and enter the amount to transfer.
3. Click **More options** to set up a recurring frequency, select a future date, or add a memo if applicable.
4. Click **Submit**.

<

Transfer

From

NETZEROP 0002

\$20.00

>

To

IMPCHK 0004

\$14.93

>

Amount

\$

1.00

Frequency

Once

>

Date

May 29

>

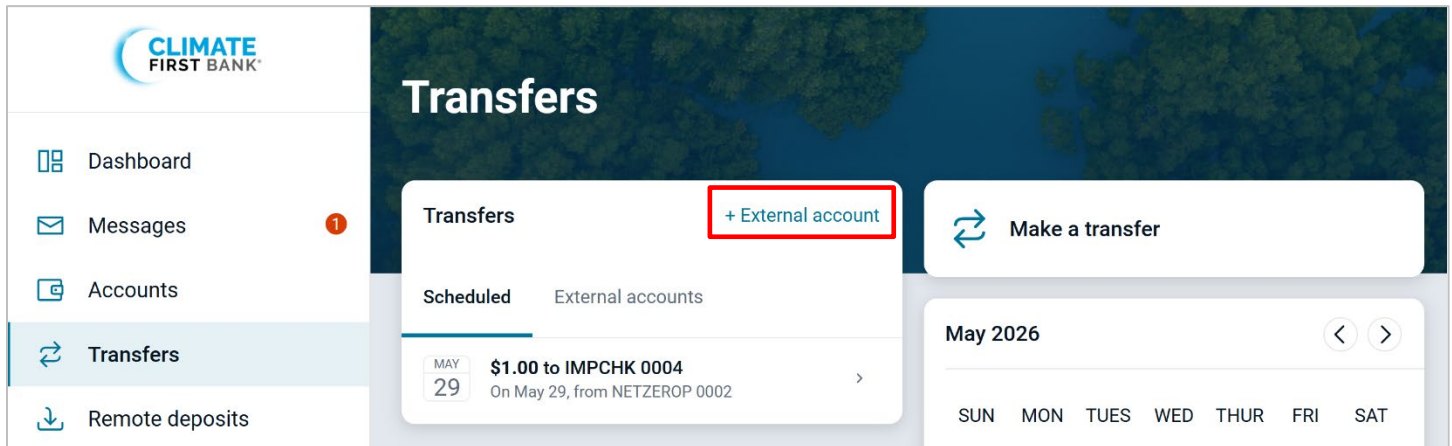
Hide options

Submit

Enroll an External Transfer Account

This feature is subject to approval.

1. Select **Transfers** from the navigation pane.
2. Click **+ External Account** in the Transfers card.
PLEASE NOTE: You may be prompted to verify your identity.



3. Enter an **Account name** or nickname for the account, **routing number**, **account number**, and select the **account type**. Click **Submit**.

Two small deposits will be sent to verify your account. When they arrive in 1-3 business days you'll need to log back in to confirm the amounts. By confirming these deposits you acknowledge you have legal access to this account.

<

Add external account

Account name

Enter

Routing no. ⓘ

Enter

Account no. ⓘ

Enter

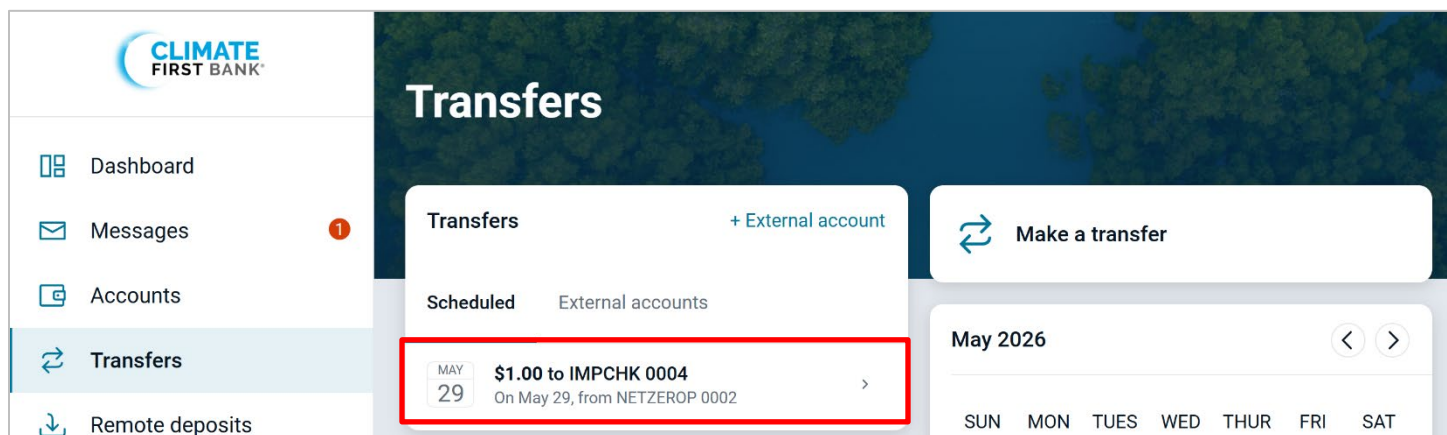
Account type

Select >

Submit

Edit or Delete a Scheduled Transfer

1. Navigate to the **Transfers** card on the **Dashboard** or the **Transfers** page and select the transfer to edit or delete.



2. Modify details and click **Save** or select the **trash can** icon to delete.

<

Transfer

🗑️

From

NETZEROP 0002

\$20.00

To

IMPCHK 0004

\$14.93

Amount

\$

1.00

Frequency

Once

>

Date

May 29

>

Save

Remote Deposits

Subject to approval, deposit checks from anywhere using your mobile device.

Enrolling in Remote Deposits

- 1. From the Dashboard, navigate to the **Remote deposits** on the left hand menu and select the accounts to enroll.
- 2. Click **Enroll**.
- 3. Click **Ok** on the confirmation screen.

<

Add account

+

=

Conveniently add funds by taking photos of your check. It's easy, fast and secure. Enroll today by selecting the accounts you wish to deposit to.

*A mobile device with the [Climate First Bank app](#) is currently required to make deposits.

☐ PERSSAVS 0012 (x9200)

☐ INTERNAL 0003 (x1150)

☐ NETZEROP 0002 (x0559)

☐ IMPCHK 0004 (x6135)

☐ NZBMEW 0001 (x9100)

☐ BUSSAV 0013 (x9201)

Enroll

<

Add account

Enrollment submitted

Your request is being processed. If an account requires additional approval, a notification will be sent when it has been enabled for deposits.

Ok

You will receive a notification once your request has been approved. The account status will change from **Account pending approval** to **Enrolled**.

Viewing Remote Deposits

Recent mobile deposits will appear on the Remote deposits card on the Dashboard or on the Remote deposits page.

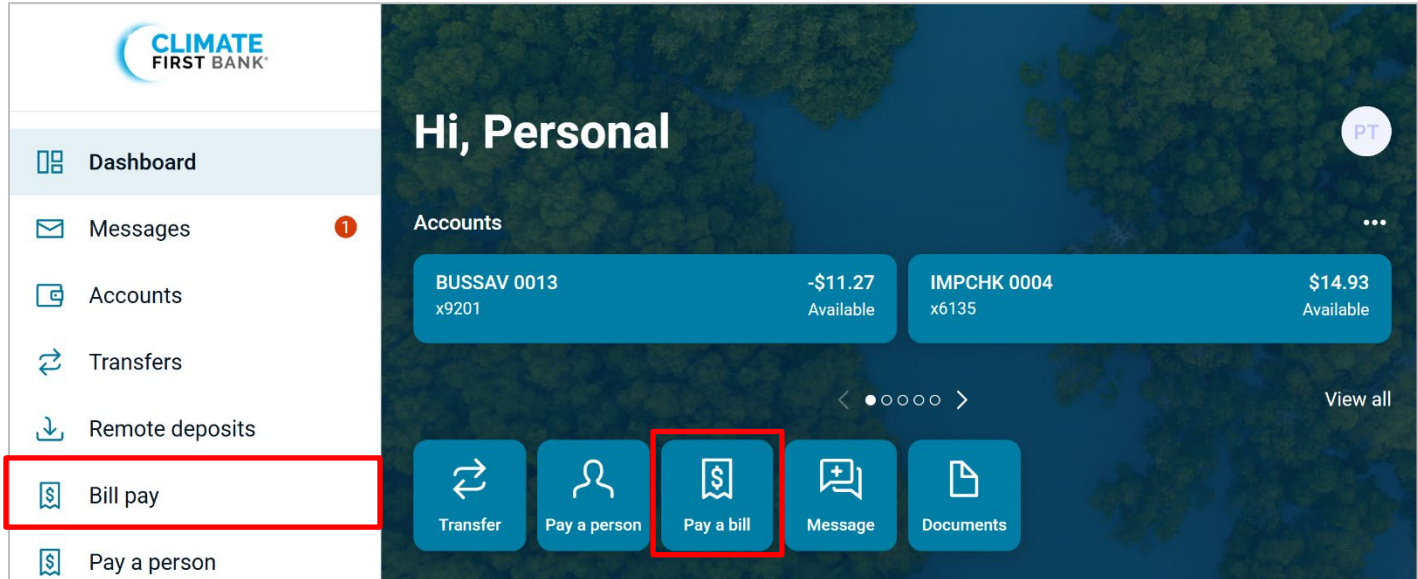
✓	Command 0132 (x3668)	\$1,573.85
	Accepted	Apr 29
✓	Command 0074 (x2559)	\$176.00
	Accepted	Apr 29

Bill Pay

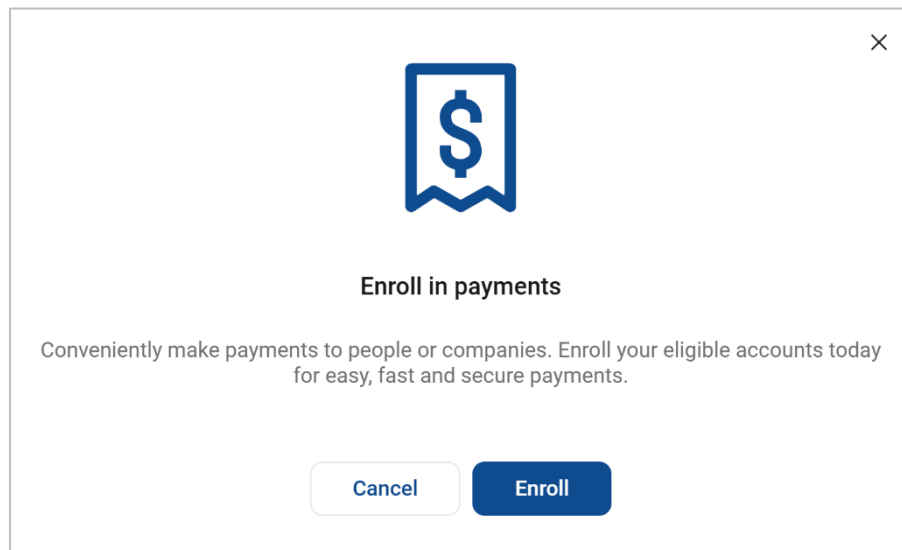
Use this feature to pay a business or a person from one of your accounts.

Enroll in Bill Pay

1. Select **Pay a bill** or **Bill pay** from the Dashboard.



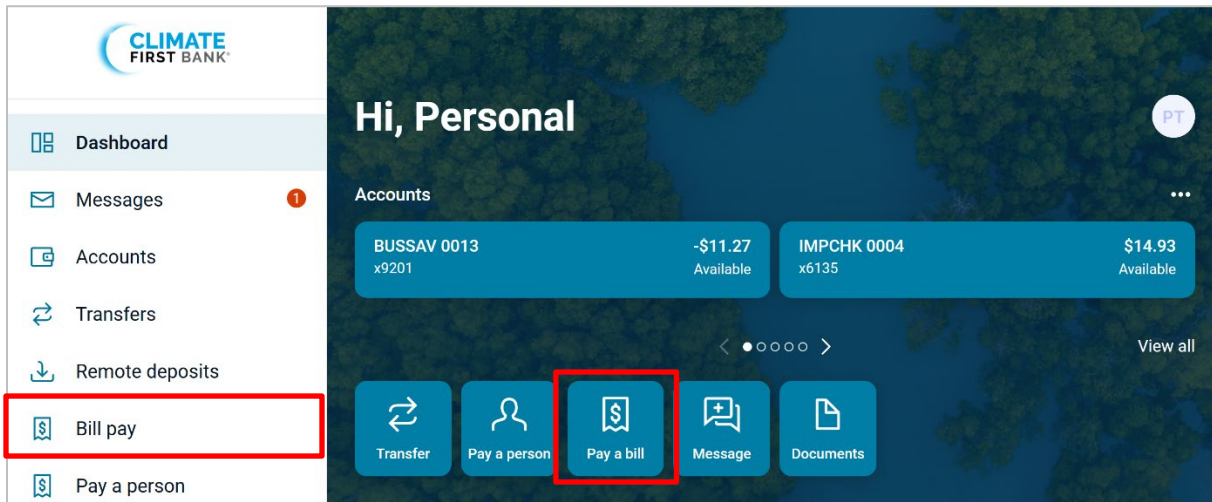
2. Click **Enroll**.



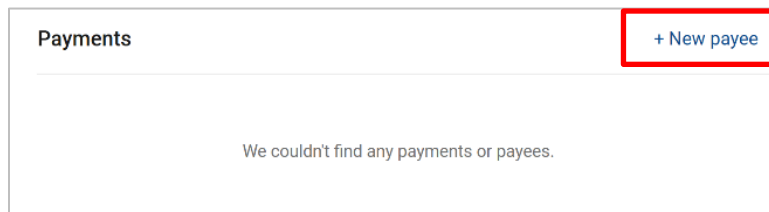
Add a Payee

Add a Company

1. Click **Bill Pay** or **Pay a Bill** from the navigation.



2. Click **+ New payee**.



3. Select **Company** for the payee type.
4. Enter the payee's name, phone, your account number, and their address.
5. Click **Submit**.
PLEASE NOTE: You may be prompted to authenticate your identity.

<

Add a bill

Payee name

Payee nickname (optional)

Phone number

Account number

Name on bill (optional)

Payee address

Street line 1

Street line 2 (optional)

City

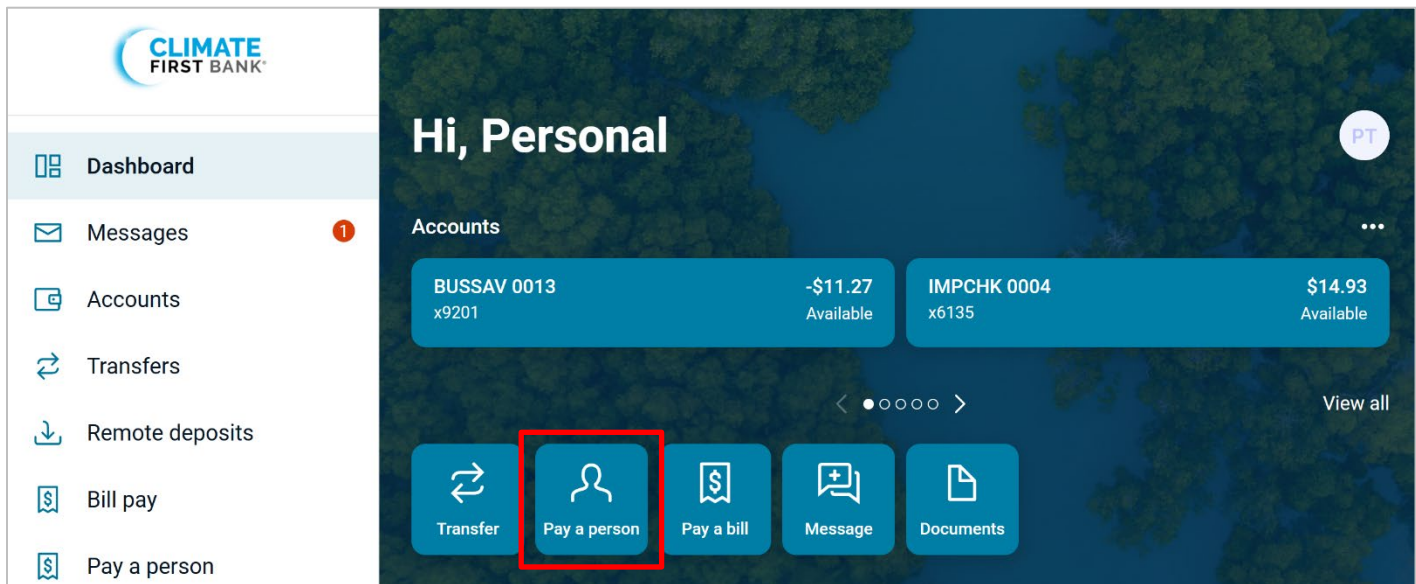
State

Zip

Submit

Add a Person

1. Click **Pay a Person**.



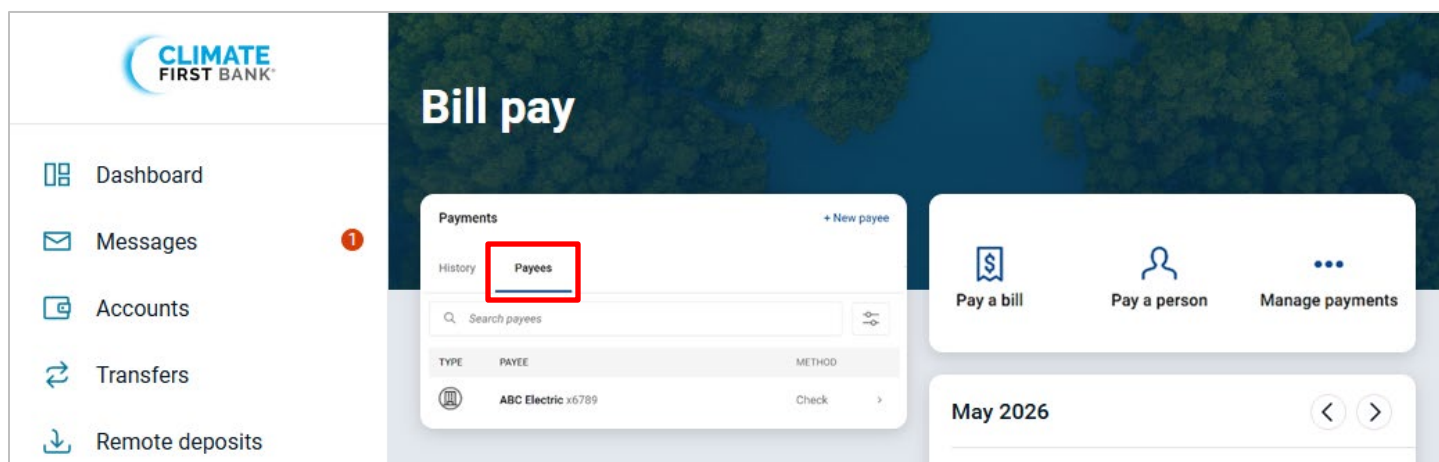
2. Click **+ Add another person**. Choose the delivery method for the payment and enter their information.
3. Click **Submit**.

Add a person
Check

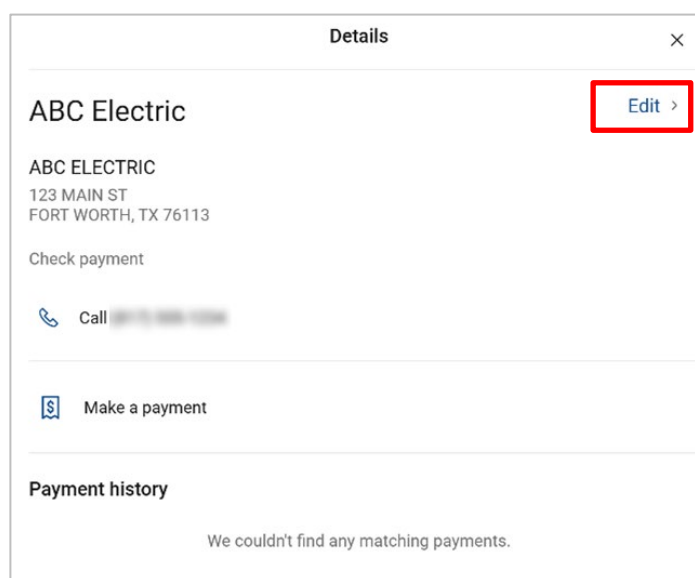
Payee address

Edit or Delete a Payee

1. Navigate to the **Bill pay** page and select the **Payees** tab.



2. Select the payee and click **Edit**. You may be prompted to authenticate your identity.
3. Modify the payee's information or click the **trash can** icon to delete.



Edit payee

Payee name
ABC ELECTRIC

Payee nickname (optional)
ABC Electric

Phone number
(817) 555-1234

Account number
x6789

Name on bill (optional)
Ima One

Payee address

Street line 1
123 MAIN ST

Street line 2 (optional)

City
FORT WORTH
State
TX
Zip
76113

Default pay from account
MMKT 0001

Digital Banking
User Guide

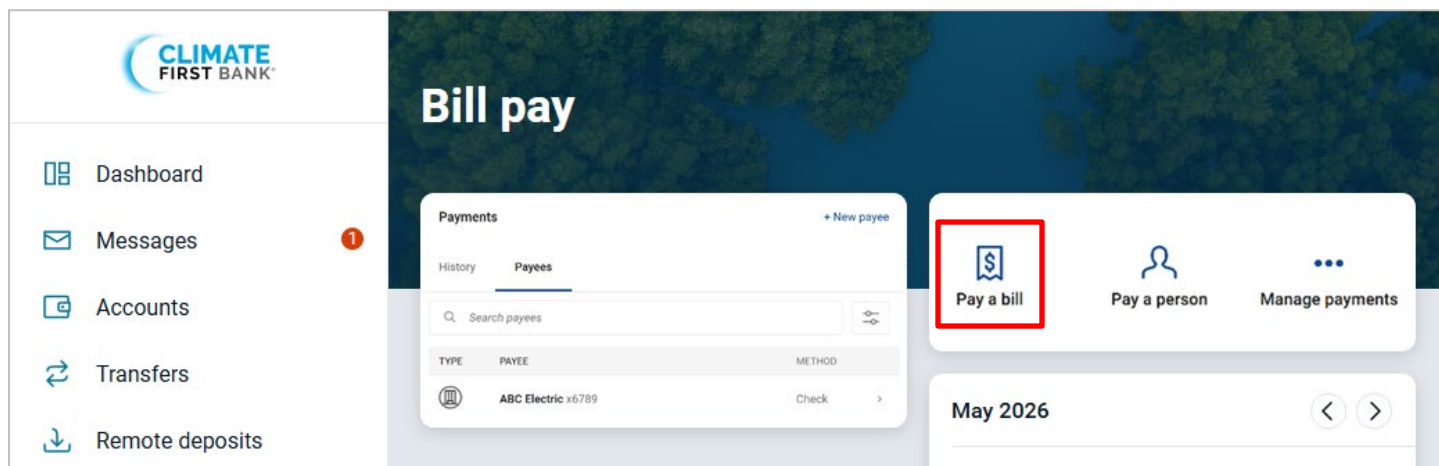
35

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Last Revised September 2026

Pay Bills

Pay a Bill

1. Click Pay a **Bill**.



2. Select the payee. Choose the *From* account for the payment and enter the amount to pay them. Click **More Options** to see other options such as the ability to future date the payment, make it recurring, or add a memo.
3. Click **Submit** at the bottom of the screen and confirm. Your payment will appear under the **History** tab.

<

Payment
ABC Electric

From

Command 0074
x2559

Amount

\$

Frequency

Once

Sends

Today
Arrives by May 27

Notes

Add memo or comment

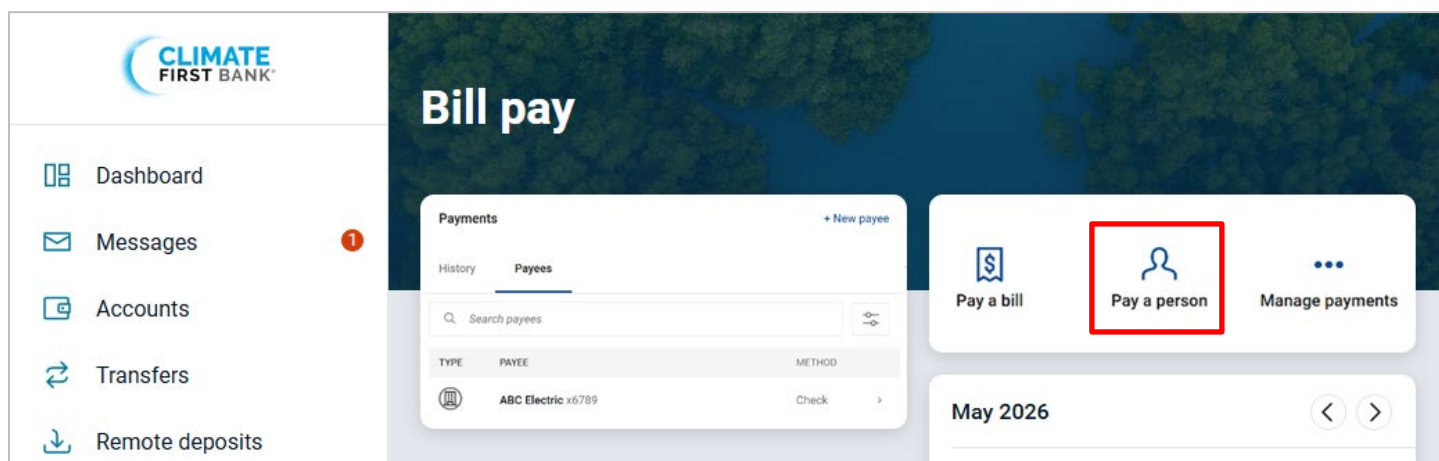
Hide options

Submit

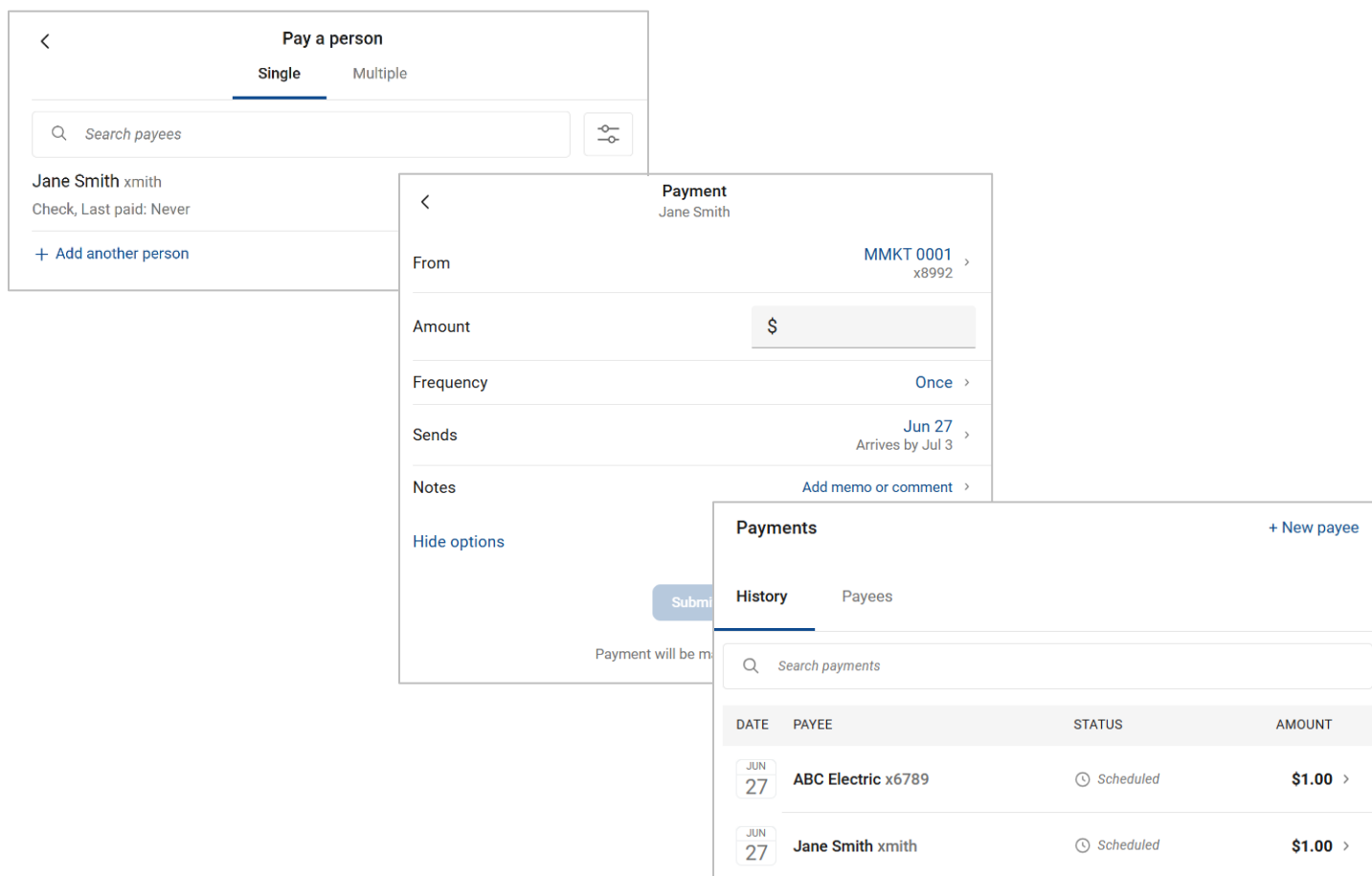
Payment will be made by check

Pay a Person

1. Click **Pay a Person**.

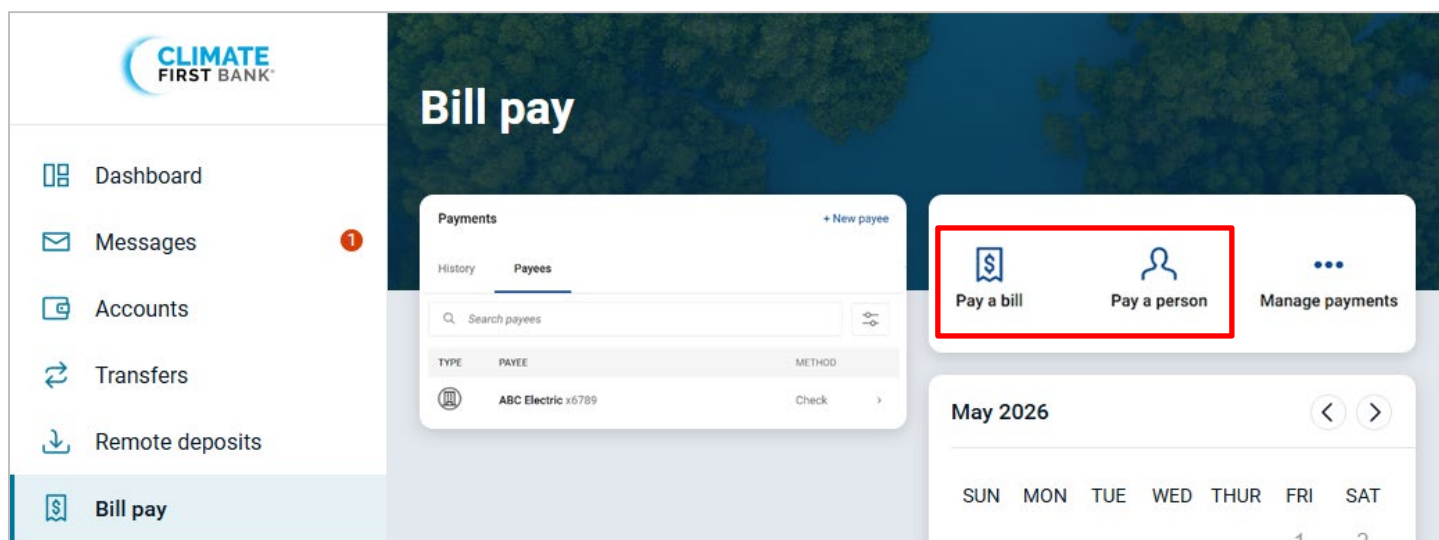


1. Select the person you want to pay.
2. Choose the *From* account for the payment and enter the amount to pay them. Click **More Options** to see other options such as the ability to future date the payment, make it recurring, or add a memo. Click **Submit** at the bottom of the screen and confirm.
3. Your payment will appear under the **History** tab.

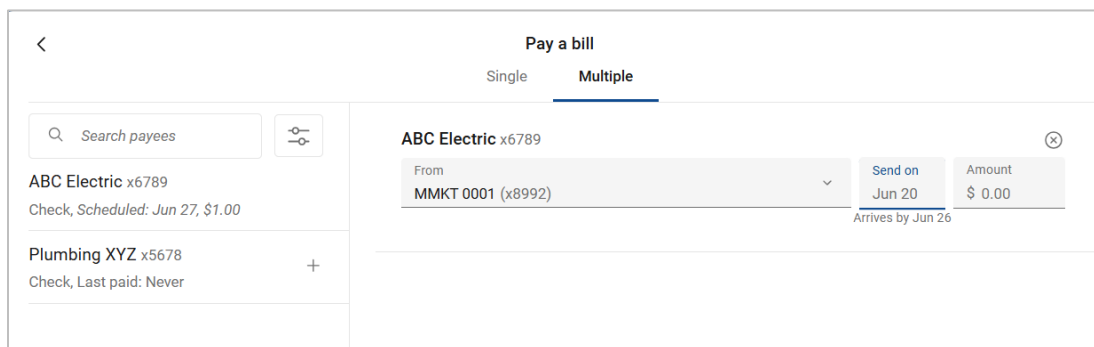


Pay Multiple Bills or People

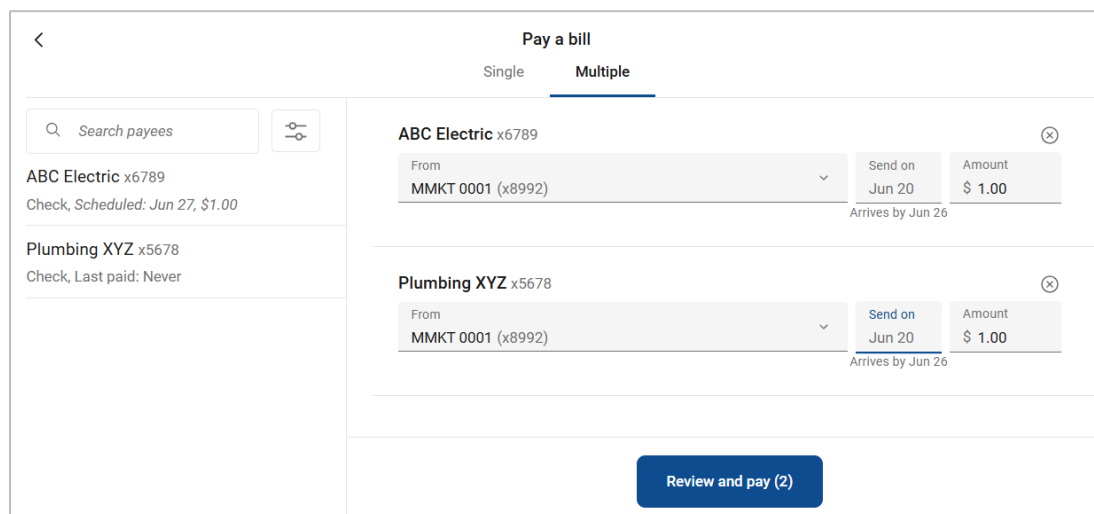
1. Select **Pay a Bill** or **Pay a Person** from the **Dashboard** or the **Bill pay** page.



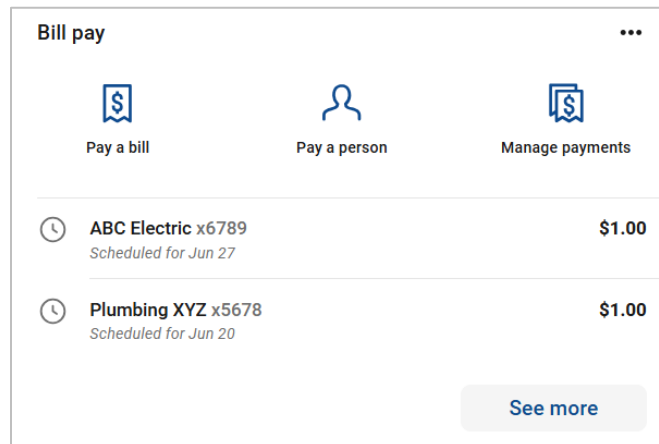
2. Select the **Multiple** tab and click the **+** next to the payees to send payments to.



3. Select the account to pay from, choose the date to send, and enter the amount. Click **Review and pay** then **Submit payments**.

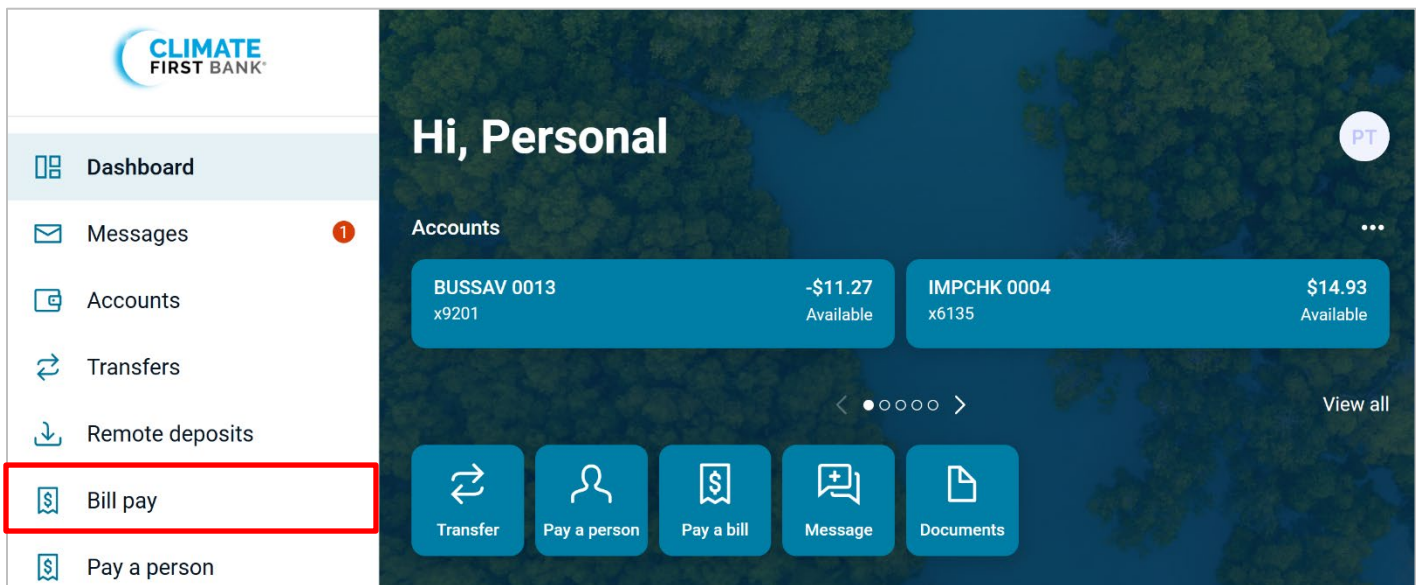


Scheduled payments can be reviewed on the **Dashboard** or on the **Bill pay** page.



Edit or Delete a Payment

1. Click **Bill Pay** from the navigation.



- Under the **History** tab, select your payment.
- Click **Edit**.

Payments [+ New payee](#)

History Payees

Search payments

DATE	PAYEE	STATUS	AMOUNT
JUN 27	ABC Electric x6789	Scheduled	\$1.00 >
JUN 20	Plumbing XYZ x5678	Scheduled	\$1.00 >

Scheduled ×

ABC Electric

\$1.00 [Edit >](#)

Standard delivery, by check

Send on
Jun 27

Estimated arrival
Jul 3

From Command 0074

Attach to a conversation

- Modify the payee's information or click the **trash can** icon to delete.

Edit payment

ABC Electric

From Command 0074 x2559 >

Amount \$ 1.00

Sends Jun 27 >
Arrives by Jul 3

Notes Add memo or comment >

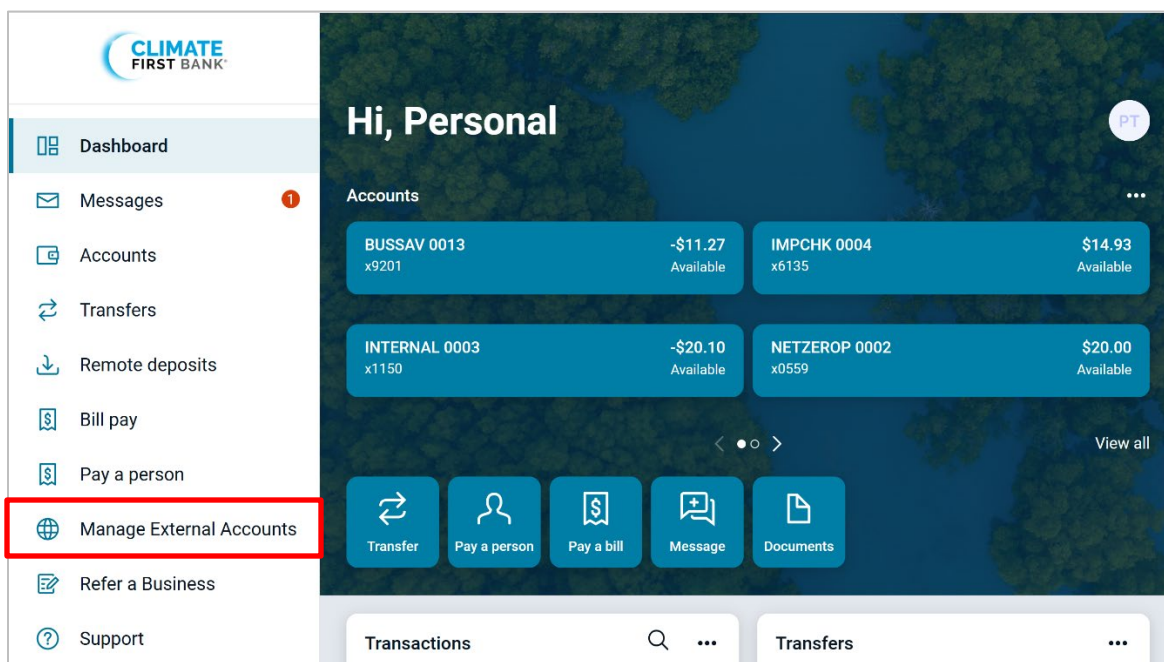
[Save](#)

Payment will be made by check

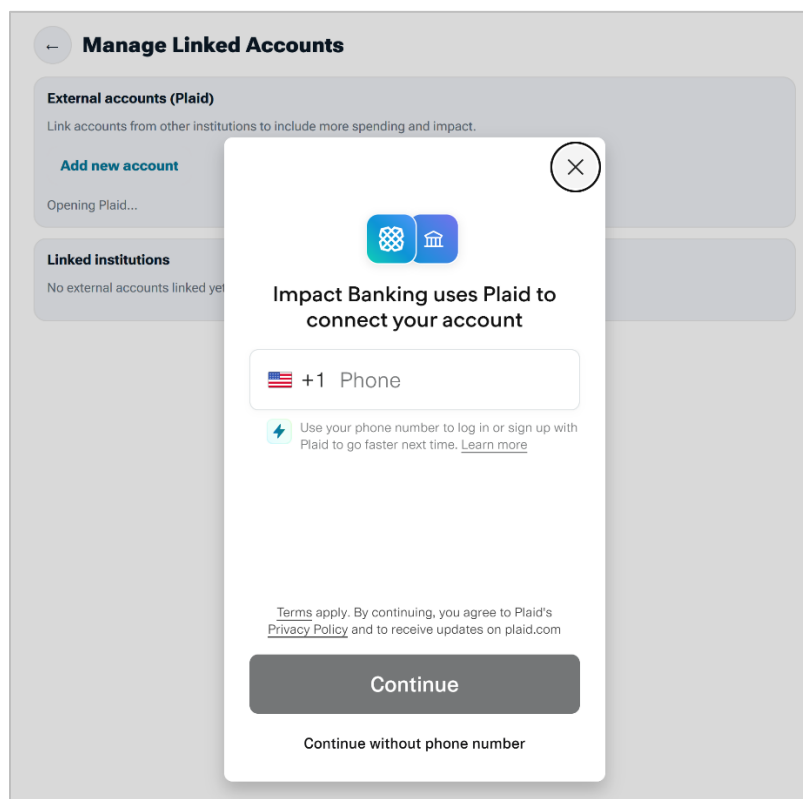
Manage External Accounts

Link to accounts at other Financial Institutions to see all of your balances and transactions in one place.

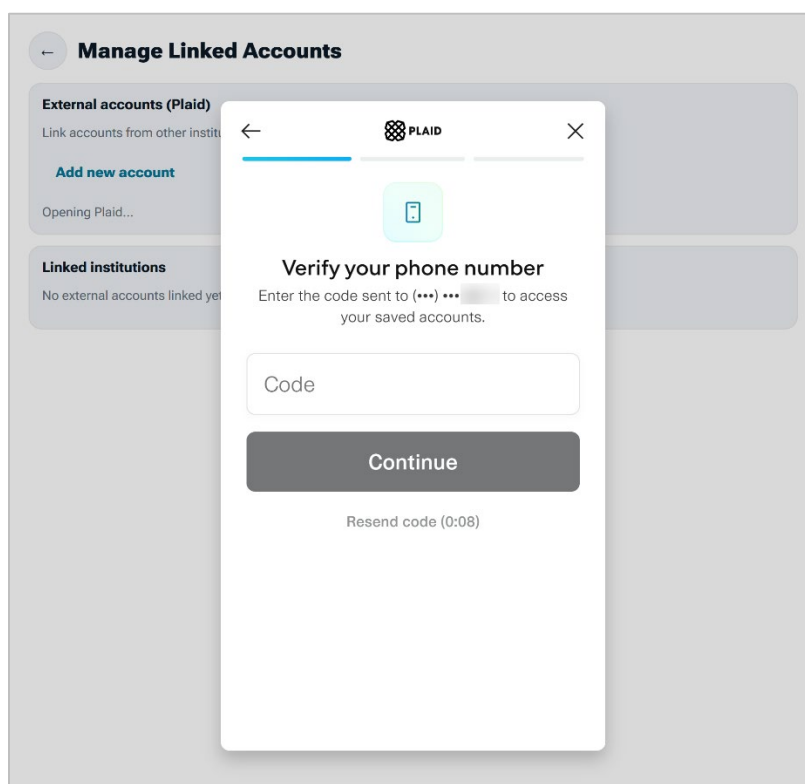
1. Click **Manage External Accounts** from the Dashboard.



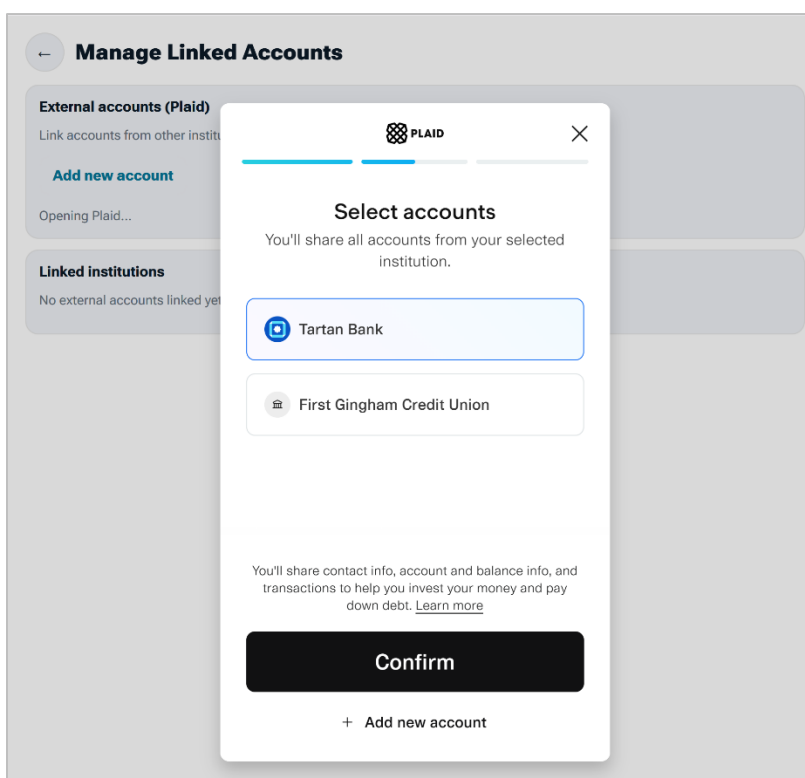
2. Enter your phone number and click **Continue**.



3. Enter the code sent to your phone and click **Continue**.



4. Select the accounts you would like to link and click **Confirm**.



5. Success!



Manage Linked Accounts

External accounts (Plaid)

Link accounts from other institutions to include more spending and impact.

[Add new account](#)

Linked institutions

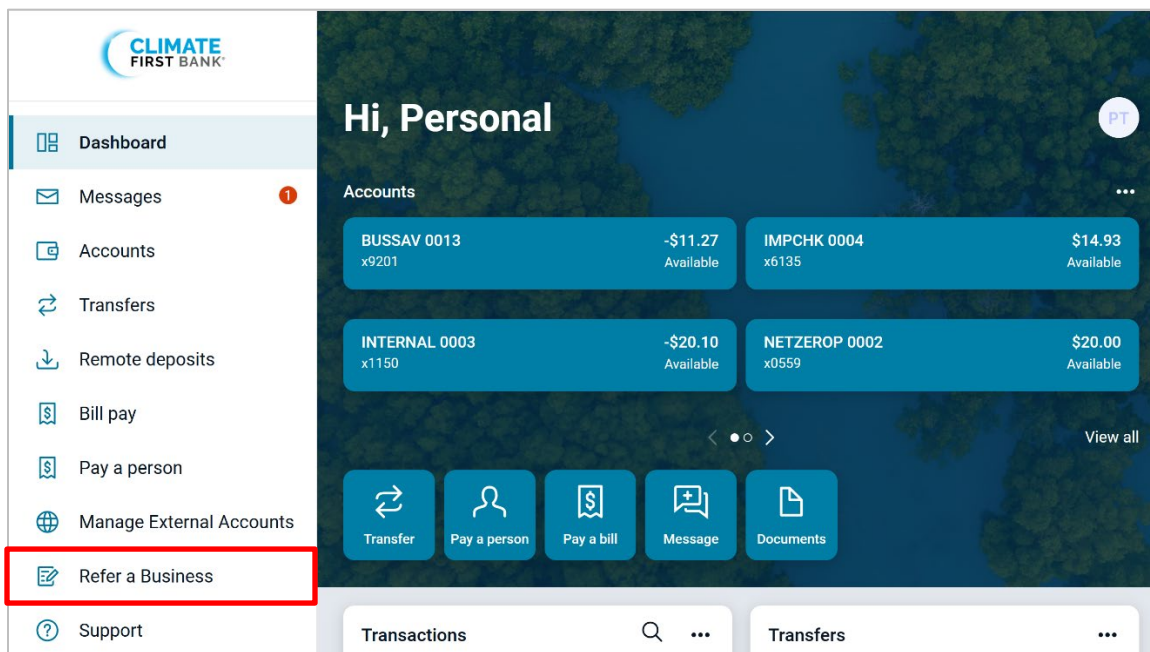
Tartan Bank

10 accounts · Total balance: \$91,971.74



Refer a Business

Click **Refer a Business** on the Dashboard to access a form to refer local businesses to us.



<
Refer a Business

Connect us with a Local Business

We're always looking for new local businesses to connect with. Fill out the form below and we'll be sure to reach out soon.

Business Name*

City*

State*

Contact Name

Contact Email

Contact Phone

Website URL

Settings

Manage your profile, security, and other features.

Click your name at the bottom left and select **Personal Settings**.

CLIMATE FIRST BANK

Hi, Personal PT

Accounts

Account ID	Balance	Status
BUSSAV 0013 x9201	-\$11.27	Available
IMPCHK 0004 x6135	\$14.93	Available
INTERNAL 0003 x1150	-\$20.10	Available
NETZEROP 0002 x0559	-\$6.00	Available

[View all](#)

[Transfer](#) [Message](#) [Documents](#)

Transactions

Transaction	Amount	Status
WIRE TRANSFER FEE	\$25.00	Pending May 2, NETZEROP 0002
OUTGOING CUSTOMER WIRE T...	\$1.00	Pending May 2, NETZEROP 0002
SERVICE CHARGE	\$5.00	Apr 30, PERSSAVS 0012
INTEREST DEPOSIT	+\$0.01	Apr 30, PERSSAVS 0012
STOP PAYMENT CHARGE	\$38.45	

Transfers

[Make a transfer](#)

Scheduled transfers

No transfers scheduled.

Schedule a future or repeating transfer so you don't have to worry about them later.

Personal settings

Account settings

Sign out

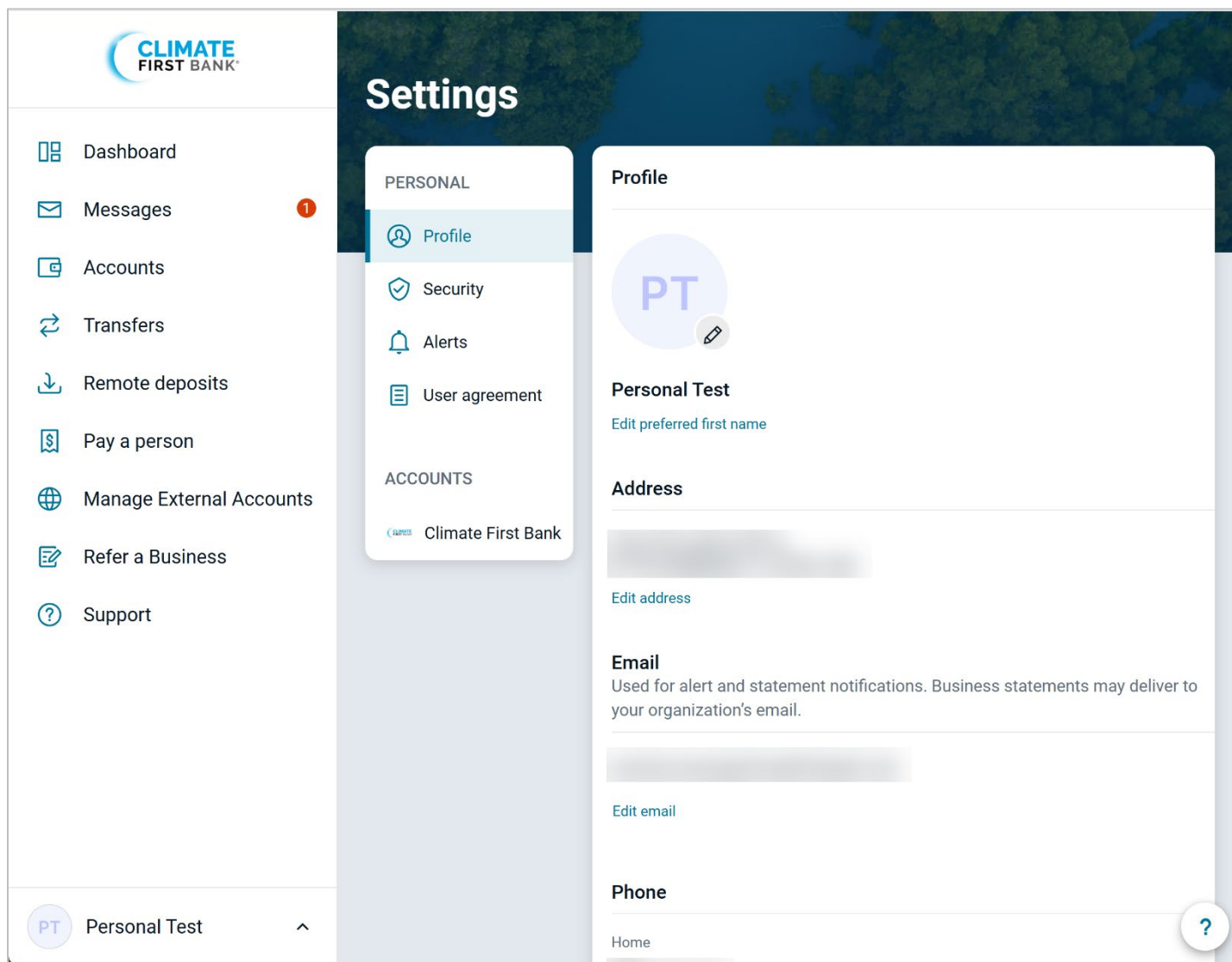
PT Personal Test

Your Spending Impact

Profile

1. **Photo** - Click the **pencil icon** to upload a profile picture, if desired.
2. **First Name** - Click **Edit preferred first name** to change how your name is displayed in online banking.
3. **Address** - Click **Edit address** to send us a request to update your address.
4. **Email** - Click **Edit email** to change your email address.
5. **Phone** - Click **Edit phone numbers** to modify your phone number.

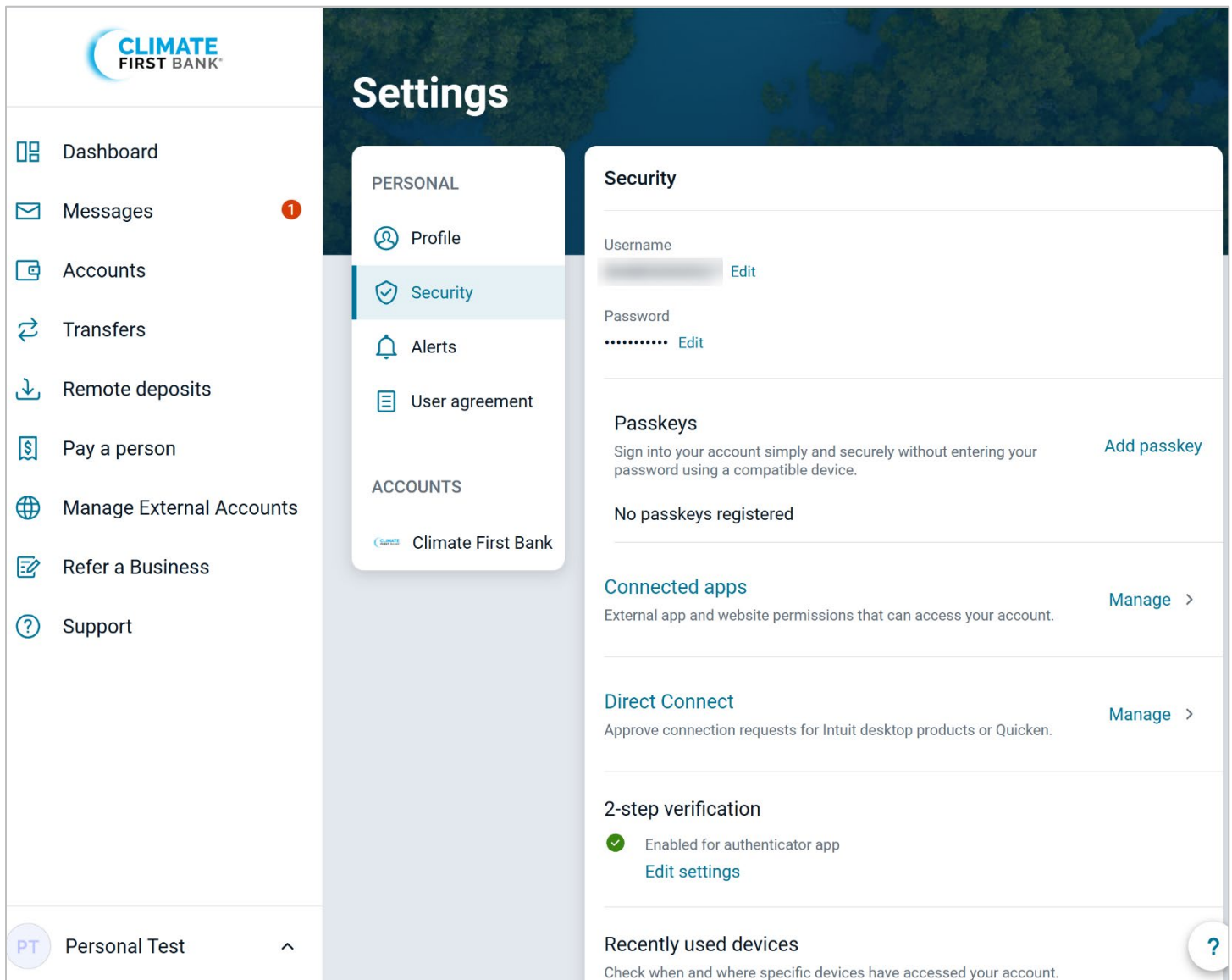
You may be prompted to authenticate your identity.



Security

- **Username and Password** - Click **Edit** to update your username and or change your password.
- **Passkey sign in** - Toggle on if your device has biometrics to use this feature in place of entering a password.
- **Connected apps** - Click **Manage** to manage external apps and websites that can access your account.
- **Direct Connect** - Click **Manage** to approve or change connection requests for Intuit desktop products or Quicken.
- **Two-step verification** - Click **Edit Settings** to remove or add additional authentication methods.
- **Recently used devices** - Review devices that have accessed your account. Click **Remove** to require that device to authenticate with two-factor authentication upon their next login.

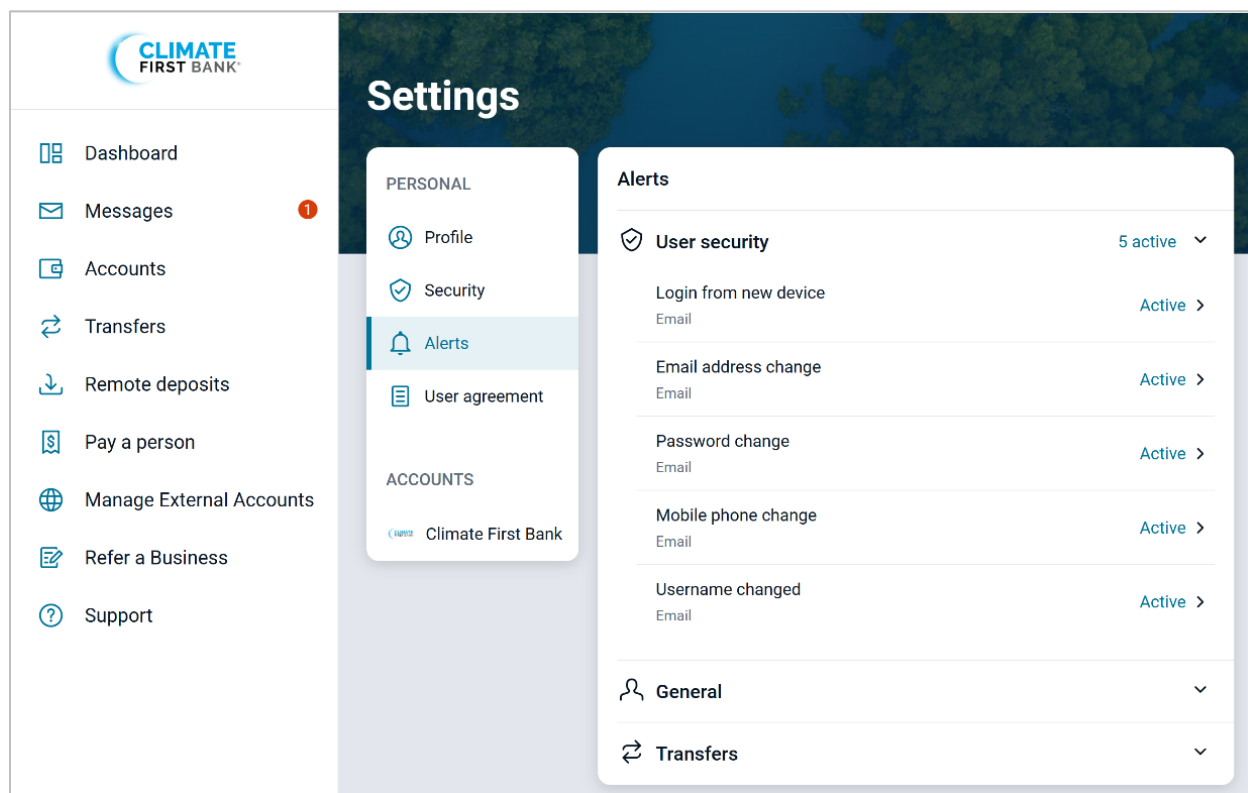
You may be prompted to authenticate your identity.



The screenshot shows the Climate First Bank digital banking interface. On the left is a navigation menu with options: Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Pay a person, Manage External Accounts, Refer a Business, and Support. Below the menu is a user profile section labeled 'PT Personal Test'. The main content area is titled 'Settings' and features a sub-menu on the left with options: PERSONAL (Profile, Security, Alerts, User agreement) and ACCOUNTS (Climate First Bank). The 'Security' option is selected. The right-hand pane displays the 'Security' settings, including fields for Username and Password (both with 'Edit' links), a 'Passkeys' section with an 'Add passkey' link, 'Connected apps' with a 'Manage' link, 'Direct Connect' with a 'Manage' link, '2-step verification' which is currently 'Enabled for authenticator app' with an 'Edit settings' link, and a 'Recently used devices' section with a help icon.

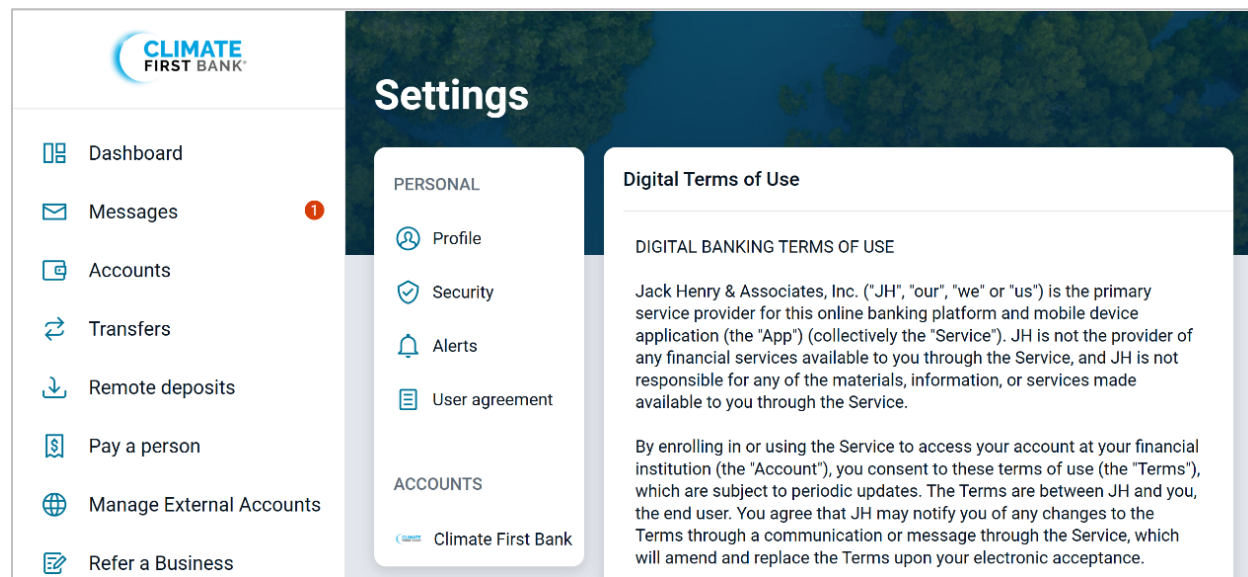
User Alerts

Certain **User Security** alerts will automatically be sent to your email if triggered. Other **General** alerts or alerts concerning **Transfers** may be configured as desired. Click an alert to toggle on email, text and/or in-app alerts.



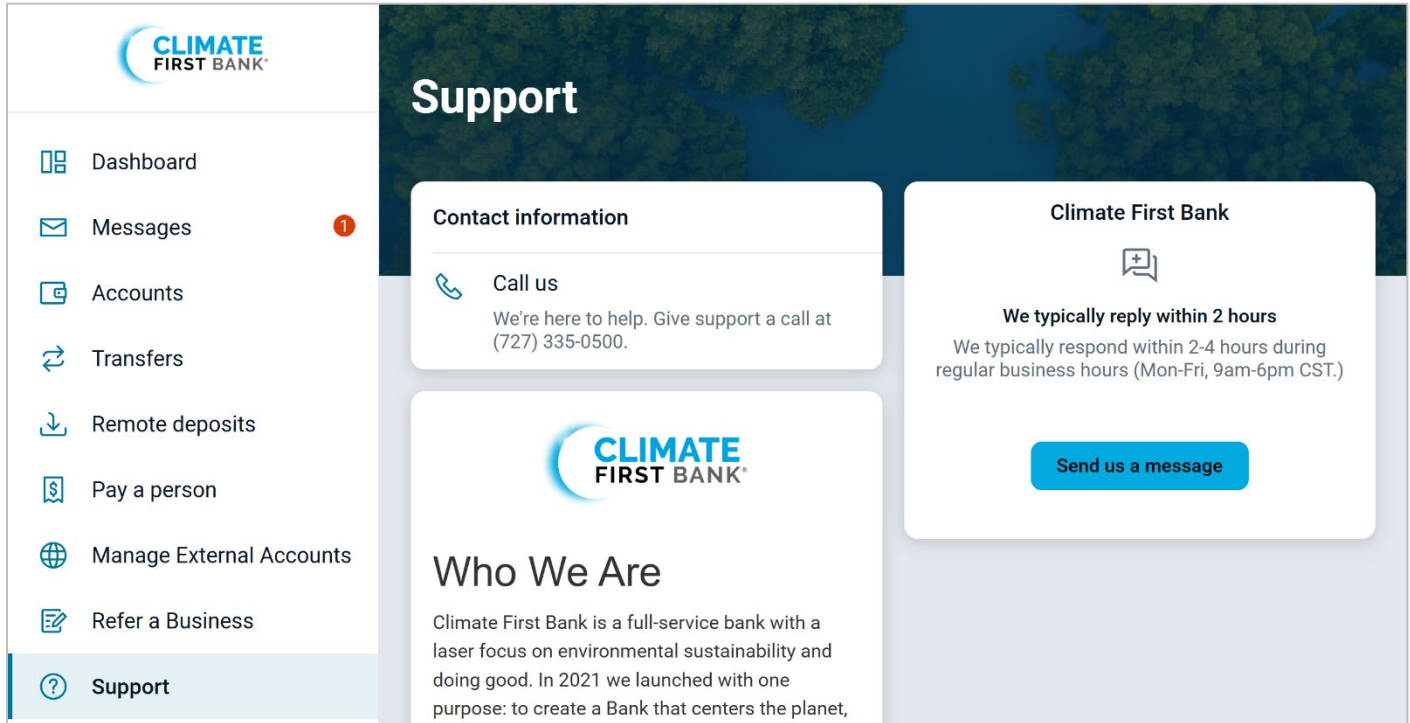
User Agreement

Click **User agreement** to review various documents you have accepted.



Support

Displays contact and information about our institution. A support card is also available on the **Dashboard**.



The screenshot shows the 'Support' page of the Climate First Bank digital banking interface. On the left is a navigation menu with icons and labels for Dashboard, Messages (with a red notification badge), Accounts, Transfers, Remote deposits, Pay a person, Manage External Accounts, Refer a Business, and Support (which is highlighted with a blue bar). The main content area has a dark blue header with the word 'Support' in white. Below this, there are three white cards. The first card, titled 'Contact information', contains a 'Call us' section with a phone icon and text stating they are available at (727) 335-0500. The second card, titled 'Climate First Bank', features a speech bubble icon, states they typically reply within 2 hours, and provides more detail about their response time during regular business hours (Mon-Fri, 9am-6pm CST.), with a blue button labeled 'Send us a message'. The third card, titled 'Who We Are', includes the Climate First Bank logo and a paragraph about their commitment to environmental sustainability and their mission since 2021.

Support

Contact information

Call us
We're here to help. Give support a call at (727) 335-0500.

Climate First Bank

We typically reply within 2 hours
We typically respond within 2-4 hours during regular business hours (Mon-Fri, 9am-6pm CST.)

[Send us a message](#)

Who We Are

Climate First Bank is a full-service bank with a laser focus on environmental sustainability and doing good. In 2021 we launched with one purpose: to create a Bank that centers the planet,