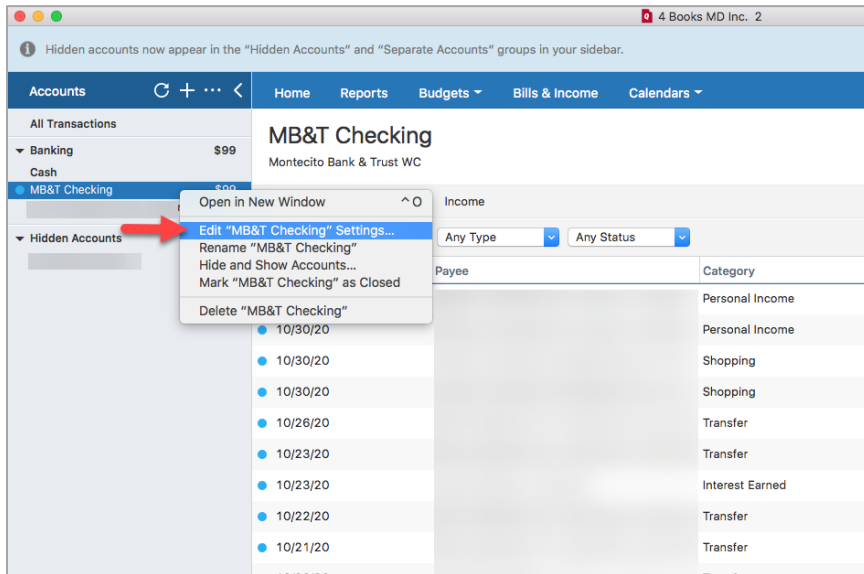




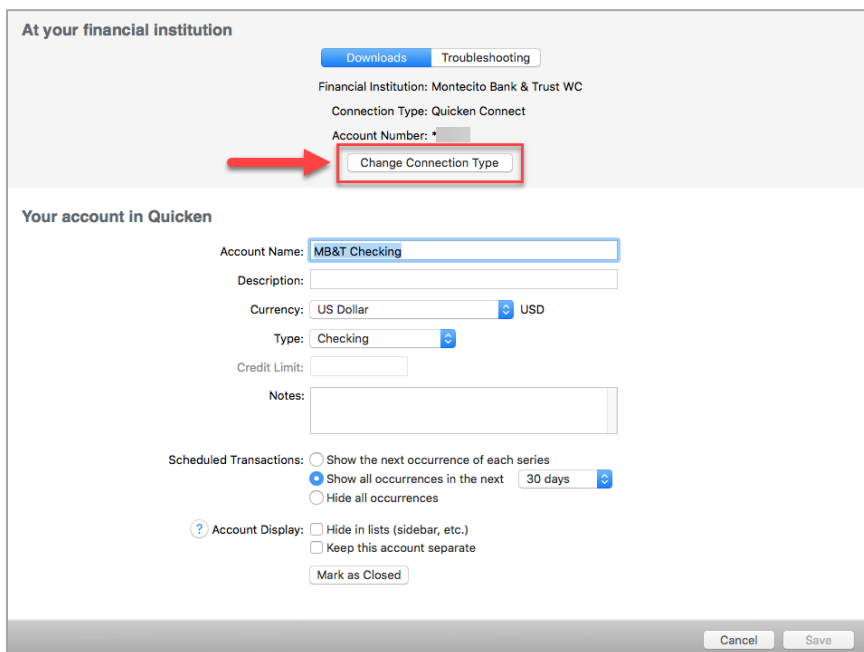
Mac Quicken Reconnection Guide

Please follow the following steps to reconnect your MB&T online services in Quicken.

1. Right click on one of your MB&T accounts listed in the **Accounts** section of Quicken. Select **Edit "... Settings**.



2. Click **Change Connection Type**.



3. Search for **“Montecito Bank & Trust.”** You should see both these options listed. Choose the connection option you prefer.

Montecito Bank & Trust Web Connect = Montecito Bank & Trust WC

Montecito Bank & Trust Direct Connect = Montecito Bank & Trust DC



Note: If you have a Ready Cash Reserve with MB&T, choose Montecito Bank & Trust WC.

The screenshot shows a window titled "Set Up 'MB&T Checking'". Below the title, it says "Select your bank. Use the search field or select from the list below." There is a search bar with "Montecito" entered. Below the search bar, a list of "Best Results" is shown: "Montecito Bank & Trust - Treasury", "Montecito Bank & Trust Credit Card", "Montecito Bank & Trust DC" (highlighted with a red box), and "Montecito Bank & Trust WC" (highlighted with a red box). To the right of the list is a large card for "Montecito Bank & Trust WC" featuring a building icon, the bank name, phone number "Phone: O: 805-560-3445 (Ext. 3445)", and a website link "https://montecito.bank/". At the bottom left of the window is a link "My bank is not in the list". At the bottom right are "Options" and "Continue" buttons.

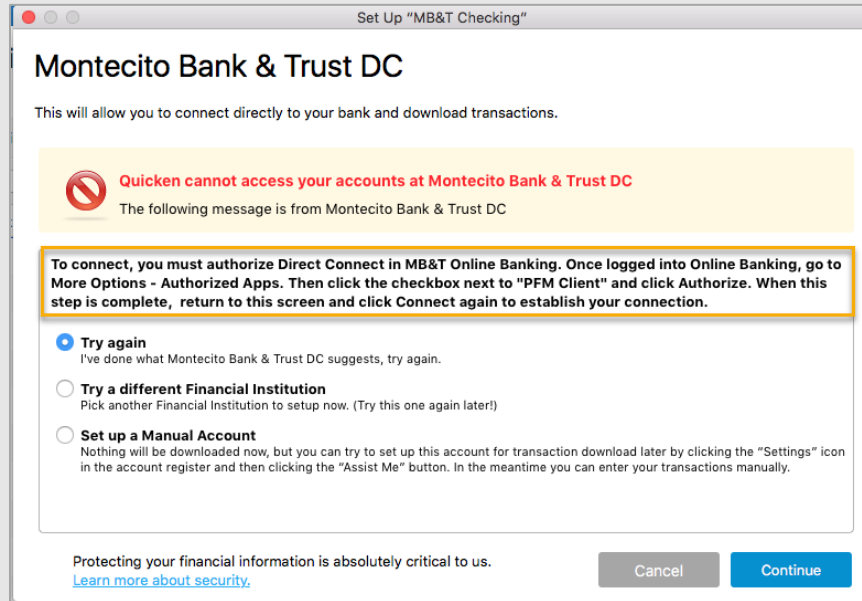
4. Enter your MB&T Online Banking credentials and click **Connect**.

The screenshot shows a window titled "Set Up 'MB&T Checking'" with the subtitle "Montecito Bank & Trust DC". Below the subtitle, it says "This will allow you to connect directly to your bank and download transactions." There are two input fields: "User ID:" with the text "Example" and "Password:" with a masked password "*****". Below the password field is a checkbox labeled "Add Password to Keychain" which is checked. At the bottom left, there is a security notice: "Protecting your financial information is absolutely critical to us. [Learn more about security.](#)". At the bottom right are "Cancel" and "Continue" buttons.

Montecito Bank and Trust DC Only

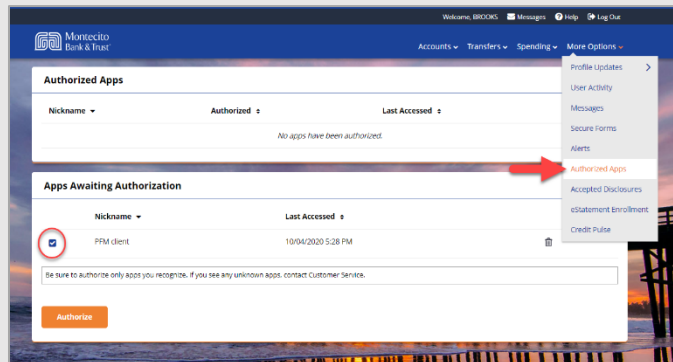
Direct Connect has to be authorized by you in Online Banking before Quicken can be linked.

The first time you try to connect with your Online Banking credentials, you will receive a connection error – this is expected. A request for authentication will be sent to your Online Banking account.



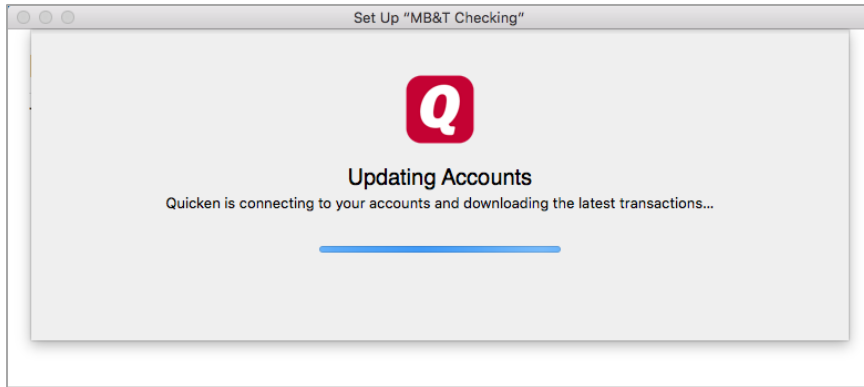
To authorize:

1. Go to **montecito.bank** and log into Online Banking with your credentials.
2. In Online Banking, go to **More Options**, then **Authorized Apps**.
3. Check **PFM Client**, and then click **Authorize**.



Once the authorization is complete, you can return to Quicken and try connecting again.

5. Quicken will connect to Montecito Bank & Trust. This could take several minutes.

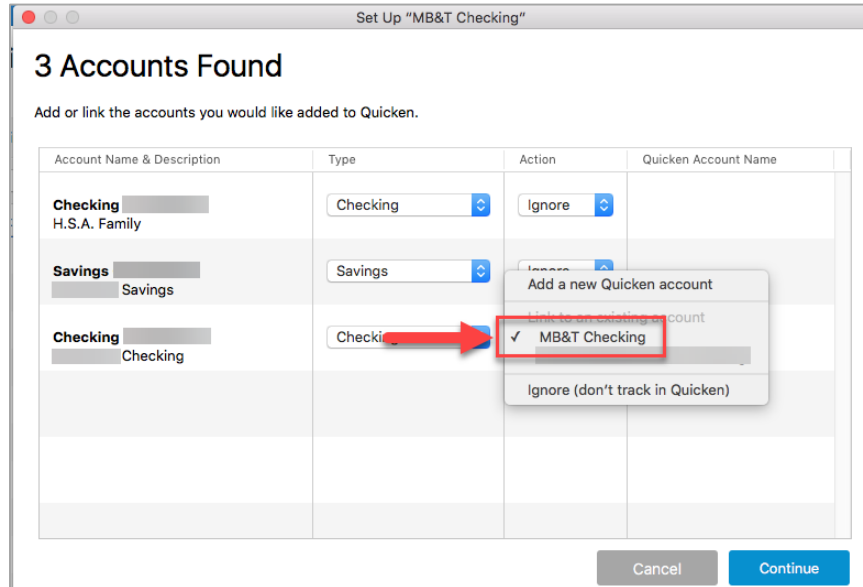


6. Select an **Action** for each account listed before you click **Continue**. To link your existing Quicken accounts, select the appropriate nickname from the drop-down for each account.



Note: It is critical that you choose the correct Action for each account displayed. To link to an existing account in Quicken, select the appropriate nickname from the dropdown.

Selecting "Add a new Quicken account" will create a new account in Quicken. Selecting "Ignore" will omit the account from the online banking connection.



7. A confirmation will display when the connection is complete.

