Secure Email Systems Guide

Montecito Bank & Trust®

Getting Started

Protecting the privacy of your confidential information is critical to Montecito Bank & Trust and our associates. We utilize a secure email system that uses encryption to transmit sensitive information outside of the Bank's network.

This guide illustrates step-by-step how to use our secure email system. Our associates are also available to assist if you have additional questions.

Support Contact Information

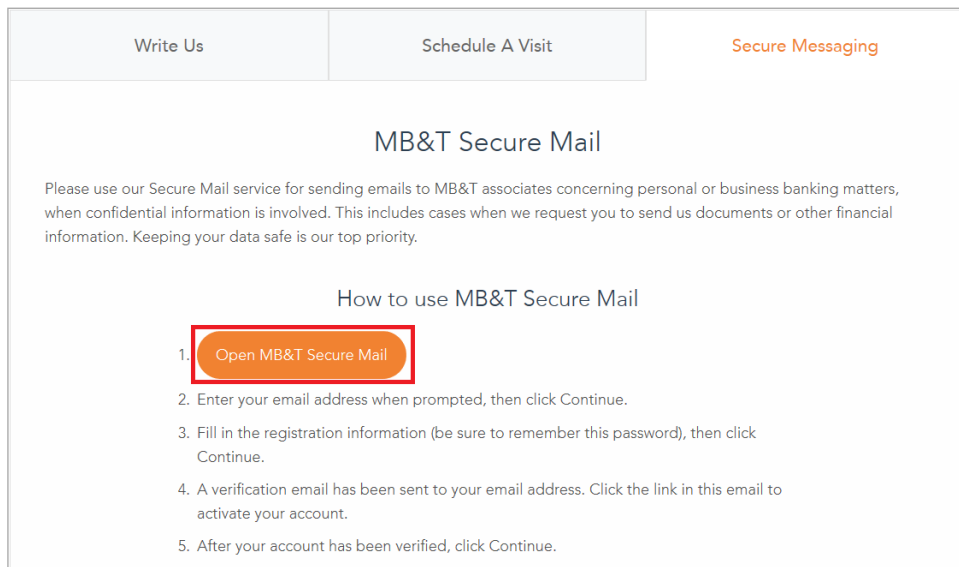Email: online@montecito.bank

Phone: 1-(805)-963-7511

Website: https://montecito.bank/contact

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Secure Email System Introduction

You can register for the Bank's secure email system by visiting our website. Simply follow these steps to get started.

Registration

1. Visit: https://montecito.bank/contact.

2. Scroll down the page and click the tab on the right labeled **Secure Messaging**.

3. Click the orange **Open MB&T Secure Mail** button.

4. In the box that appears enter your email address and click the blue **Continue** button.


5. A second box will appear and request that you enter your first name and last name and create a password using the following requirements:

- Passwords must be 8-20 characters long.

- At least one digit (0-9).

- Both uppercase and lowercase characters are required.

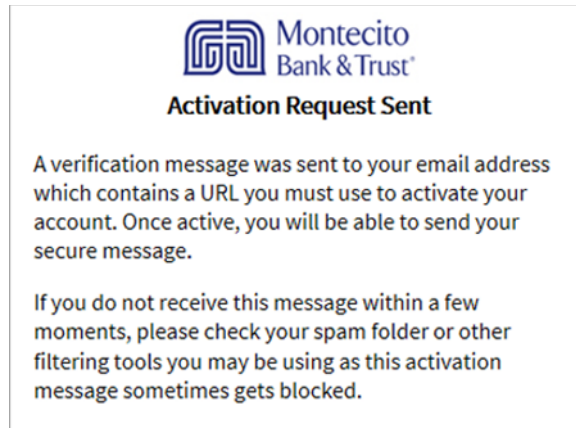- Your username **<u>cannot</u>** appear in the password.

6. Login to the email account that you entered during registration. You should receive an activation email titled **Proofpoint Encryption Registration** from an address that ends in @montecito.bank. The email will contain a validation code.

   Email Preview:
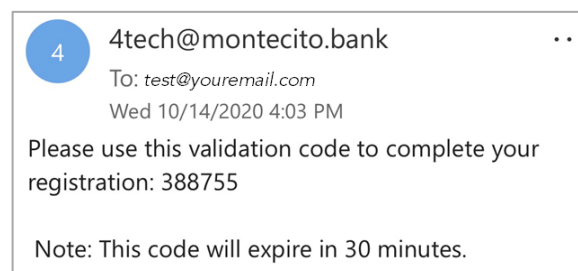
> 📄 **Note:** The link will expire after thirty minutes.

7. Enter the validation code then click the blue **Continue** button and the browser will display a message confirming that an activation email was sent.

8. Login to the email account that you entered during registration. You should receive an activation email titled **Montecito Bank & Trust Secure Mail Registration** from an address that ends in @montecito.bank. The email will contain a link to activate your account. If it does not arrive, please check your spam folder.

Email Preview:
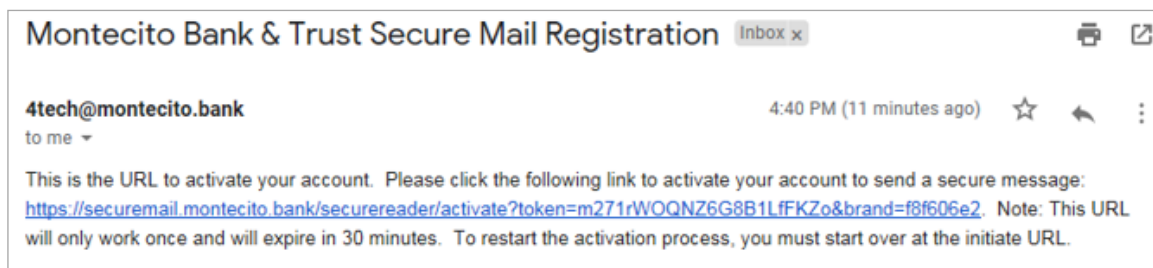
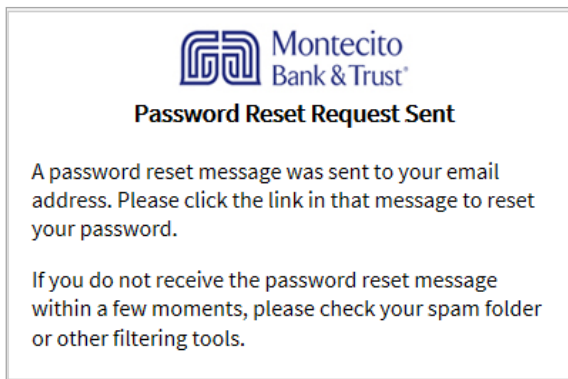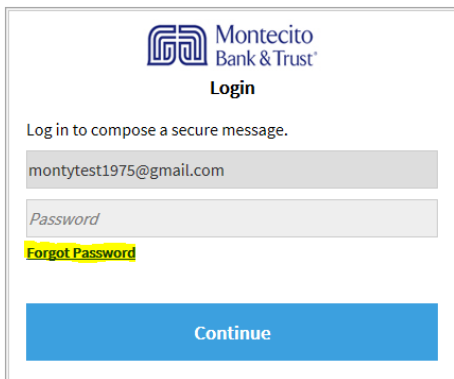> **Note:** The link will expire after thirty minutes.

9. Click the activation link in the email and a window will pop up to confirm your account has been activated. Click **Continue** to complete the registration process.
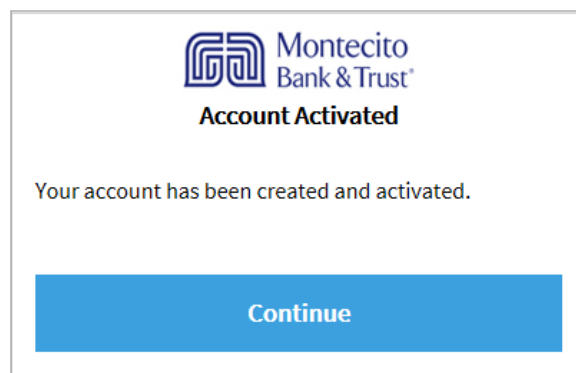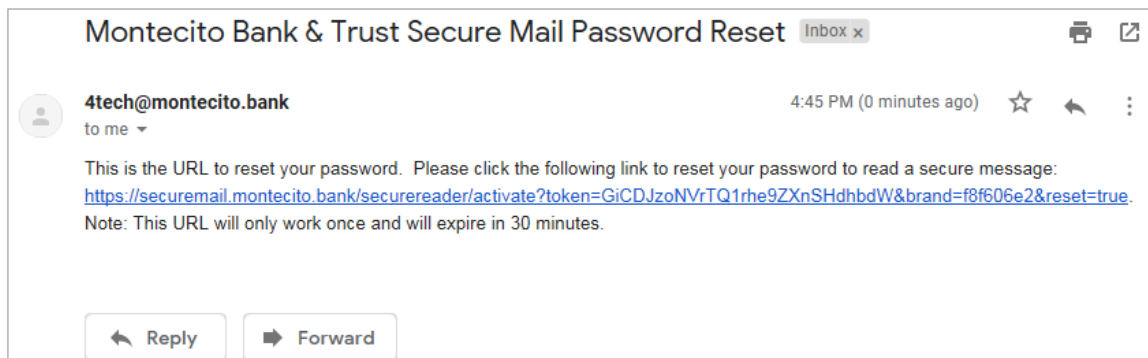
Password Reset

In the event that you have forgotten your password, follow these simple steps.

1. Follow steps 1-4 on page 4 in the **Registration** section of this guide.
2. Click the **Forgot Password** link and a Password Reset confirmation page will display in your browser.

3. You will receive an email titled **Montecito Bank & Trust Secure Mail Password Reset**, coming from an address that ends in @montecito.bank. The body of the email will contain a link to activate your account to begin sending secure messages.

   Email Preview:

> **Note:** The link will expire after thirty minutes.

4. Click the link and a window will pop up to reset your password. Once you reset your password, select the blue **Continue** button. Password requirements are as follows:

- Passwords must be 8-20 characters long.

- At least one digit (0-9).

- Both uppercase and lowercase characters are required.

- Your username **cannot** appear in the password.

5. The secure email system will open.

Receiving a Secure Email from MB&T

1. When a secure email is sent from MB&T, open the email and select **Click Here** to be directed to the secure email system log-in page.
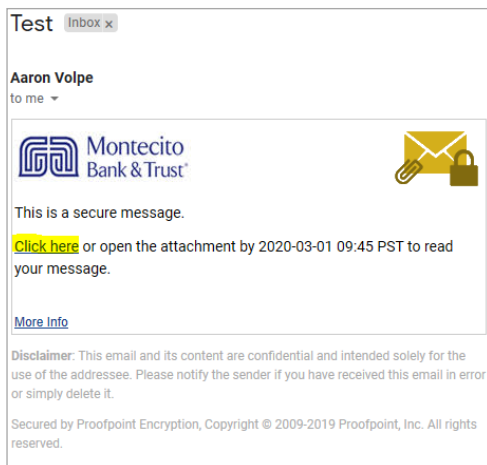

> 🗒 **Note:** If you have yet to register for the secure email system, you will be prompted to do so at this time.

2. Open the email you would like to view along with any corresponding attachments. To reply to a message, simply click one of the blue **Reply** or **Reply All** buttons.
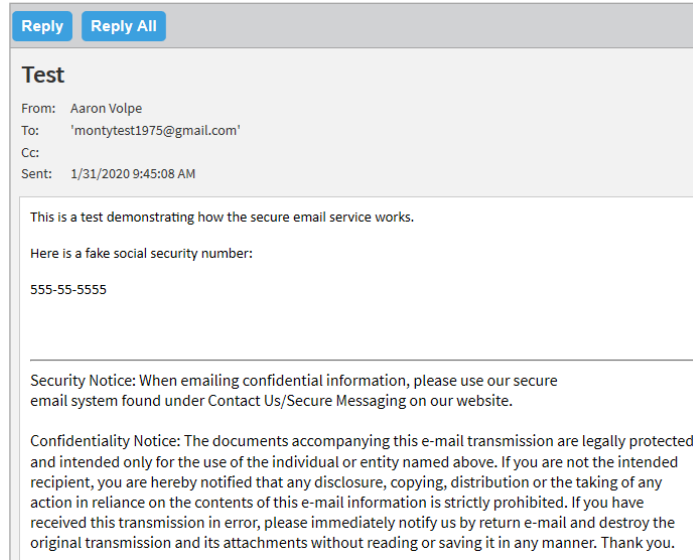
3. To send your reply, click the blue **Send** button. You may also request a copy of the email by checking the **Send Me a Copy** checkbox.
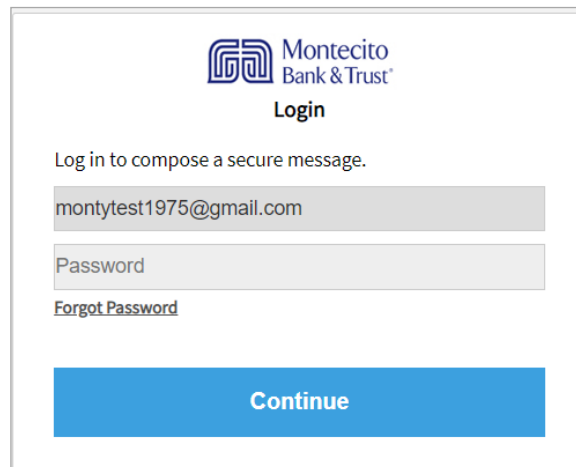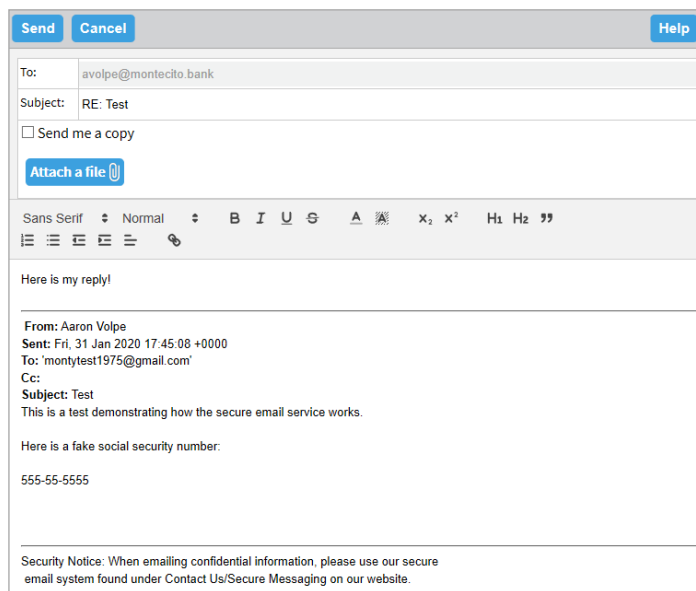

4. A confirmation box will appear. From here you can **Create a New Message**, **Return to the Previous Message** or **Logout** of the secure email system.
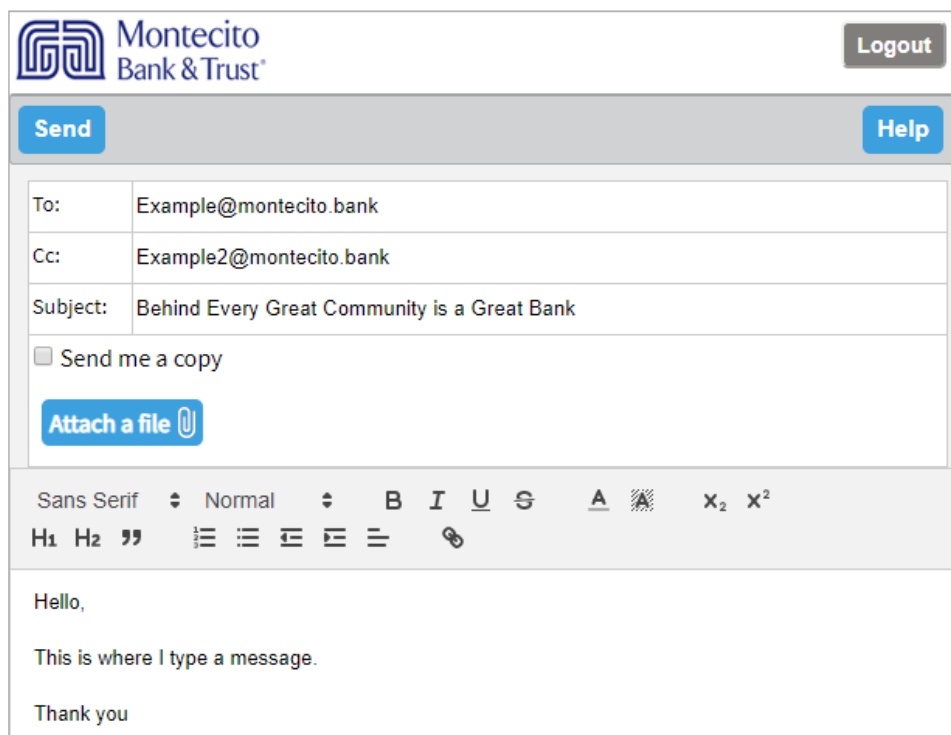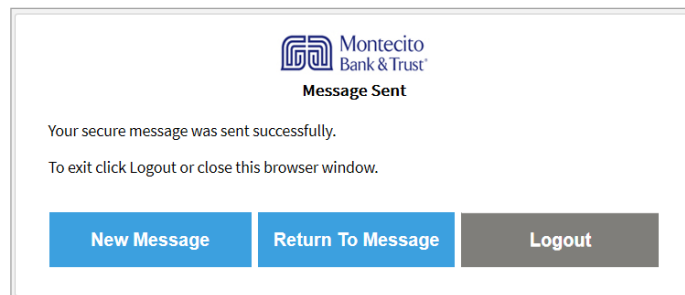
Sending a Secure Email to MB&T

1. Follow steps 1-4 on page 4 in the **Registration** section of this guide.

2. A box will appear and request that you enter your password. Click the blue **Continue** button.

3. Once you have logged in, you will arrive at the following screen. The "To," "Cc," and "Subject," fields function the same as traditional email. The white area at the bottom is used to compose the email.

4. To attach a file, click the **Attach a File** button and click the **+ Sign** button to browse for a file. Once the file is selected it will show up under the **Attach a File** button.

5. Once complete, press **Send** and a confirmation box will appear and prompt you to create another message, or logout of the secure email system.

Disclaimer: The secure email system (the system) only provides encryption services when communicating with Montecito Bank & Trust (MB&T) in the methods outlined in this document. The system can't be used for communicating with parties outside of MB&T, and the system does not afford or assume any protections outside of this document's scope.