<u>Bank "view only" instructions.</u>

To set up a "view only" account for your bookkeeper to access your banking statements, please follow the instructions below based on your bank. For contact information, please use the first and last name: Mitchell Nemitz, and email address: bookkeeping@mitchellnemitzcpa.com.

- **American Express**
  - When you sign into your account, go to "Account Management" and then "My Account" and "User Administration."
  - You can then select "View/Modify" to create a *view only* access for your bookkeeper.
  - Finally, choose their limits and the accounts you want them to access.

- **Bank Of America (from bank website)**
  - To add a user/viewer to your account, you will need to upgrade your account to Business Advantage 360 to incorporate an "Account Management" option.
  - When you sign into your account, head to the "Business Services" on the bar, select "Add New Users," and fill out the fields for your bookkeeper. Select Continue.
  - You will then be directed to a new user profile. Select the "Accounts and Services" tab. Choose which services/account you would like your bookkeeper to access.
  - Finally, select "Allow this user to access this account" and choose view and/or transactional. Select "Continue" and save.

- **Capital One (from website)**
  - To add a *view only* user, follow the directions on the manage users page.

- **Citi Bank**
  - Please call your bank support center.

- **<u>Chase Bank</u>**
  - When you sign into your account, select “Account Management.”
  - Go to the drop-down menu and select “Access and Security Manager.”
  - Click “Add New User,” fill in the information fields, and assign their limits to *view only* and choose the accounts you would like them to access.

- **<u>Costal Credit Union</u>**
  - Please call your bank support center

- **<u>Dogwood State Bank</u>**
  - Please call your bank support center

- **<u>Edward Jones (from website)</u>**
  - Once you have logged into your account, click the “User Options” tab and then click the “Linked Accounts” section.
  - Choose the account you would like your accountant to have access to.
  - Create a user ID and password.
  - Review the information and hit the approve button.

- **<u>Fidelity Bank</u>**
  - Please call your bank support center.

- **<u>First Citizens (from website video)</u>**
  - When you sign into your account, go to “Administration and Settings.”
  - Click “Add New User”
  - Put in the information for your bookkeeper, then choose their limits and the accounts you want them to access.

- **<u>First National Bank (Union Bank)</u>**
  - Please call your bank support center.

- **<u>First Horizon</u>**
  - Once you've logged in to your account, go to your profile and select "User Management."
  - Select "Add new user" and fill in your bookkeeper's information.
  - Finally, assign their limits to *view only* and choose the accounts you would like them to access.

- **<u>Lowes CC</u>**
  - Please call your bank support center.

- **<u>Mercury Cards (from website)</u>**
  - Go to "Team Settings" and give your bookkeeper user a "Bookkeeper" title. You can also edit roles and how much you want them to access.

- **<u>North State Bank</u>**
  - Please call your bank support center.

- **<u>PayPal</u>**
  - When you sign in, go to your profile and click "Account settings."
  - Select "Update" and then "Add User."
  - Add the information for your bookkeeper and assign their limits and accounts you would like them to have access to.
  - Your bookkeeper should receive an email to activate their account and create a password.

- **<u>PNC Bank</u>**
  - Once you have logged into your account, select the "Business Tools."
  - Find the section for "Account Delegation" and click "Add/Edit Users."
  - Add the information for your accountant, give them limited access to *view only* and make sure you select which accounts you would like them to access.

- **<u>Providence Bank</u>**
    - Please call your bank support center.

- **<u>Regions</u>**
    - Please call your bank support center.

- **<u>Truist/BB&T</u>**
    - When you log into your account go to your profile.
    - Click "Business Admin."
    - Select "Add User," and fill in the fields with your bookkeeper's information. You will need to make them a user ID and password. You will also need to add their access level for *view only*. Make sure you give them access to all the accounts you need them to see.

- **<u>Wake Forest Federal</u>**
    - Please call your bank support center.

- **<u>Wells Fargo</u>**
    - When you login to your account, go to "Small Business" on the bar and select "Account Access Management."
    - Select *view only* and then choose their limits and the accounts you want them to access.