

A NEW and Improved Virtual Banking Solution Has Arrived

Please contact 1-844-282-7372 for more information

Login

The login screen is now directly located on our home page www.sandiegoprivatebank.net. You may want to refresh your established browser favorites to ensure they are directed to the new login page.

The screenshot displays the San Diego Private Bank website. At the top left is the bank's logo. On the right, the 'Online Banking' login section is highlighted with a red box, showing fields for 'Username:' and 'Password:', along with 'Register', 'Forgot Password', and 'Login' links. Below the header, there is a 'New Hours for Coronado and Downtown Branch' announcement. A navigation bar includes 'Personal Banking', 'Business Banking', 'Lending', and 'Contact Us'. A sidebar on the left contains links for 'About Us', 'Locations & Hours', and 'Deposit Rates'. The main content area features a banner with a sailboat and the text 'Our financial solutions allow you to sail through your day'. Below the banner are two promotional boxes: one for 'All Aboard!' regarding the new online banking system, and another for 'SBA Loans Available from \$100,000 to \$5million.' with the tagline 'Let us help you grow your business.' and a 'Learn More' link.

New Password criteria: The system may ask you to change your password the first time you sign on to conform to the new criteria which includes at least 8 characters, one capital letter, one lowercase letter, and one number.

Personal online users: Your login information will remain the same when accessing the new system.

Business online users: We will no longer be requiring use of the Company ID. Your user id and password will remain the same when accessing the new system.

Having Problem Signing On? . If you know your username (formally known as Login ID or User ID), you have the ability to use the "Forgot Password" feature. Simply input your username and select the "Forgot Password" option to continue onto the verification process. If you have attempted to login unsuccessfully three times in a row, you may have been locked, and you will need to contact us at 844-282-7372 for immediate assistance. The "Forgot Password" option cannot be used once you have been locked out from your online profile.

Existing Bill Pay Customers

All of your single or recurring payments have been converted to the new system

You have access to your past bill payment history as far back as one year

Your payee's method of payment may change on the new system

❖ Electronic Bill Pay recipients may be sent as a check payments on the new system & vice versa
Your E-Bills did not convert, and they will need to be setup again on the new system

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Quicken Users

If you use the “one step update” feature, you will need to complete an account deactivation and reactivation process within your Quicken application. Please contact our Treasury Management department at 844-282-7372 if you need assistance with this process.

Quickbooks Users

If you export account activity, you will need to complete update our institution within your Quickbooks application. Please contact our Treasury Management department at 844-282-7372 if you need assistance with this process.

New Services

Enhanced User Experience and Functionality

New Personal Online Banking Application

Business Mobile Banking Application

Mobile Deposit*

External Transfers*

Secure Messaging

Robust Bill Pay Service

*Terms and Conditions Apply

Additional information

- Recurring internal transfers have continued without interruption
- You have account history as far back as 18 months available online
- If you have not logged onto the system in the past six months, your profile may have been deleted
- One Time Passcode is now referred to as the Secure Access Code
 - We encourage you to input your cell phone as a delivery option to receive of your secure access code via phone call or text. This option is located under the **Settings** tab under **Login Preferences**. You may update your delivery options once you select the **Secure Delivery** button. This is the fastest and most secure method of receiving your Secure Access Code.
 - International phone numbers are currently not enabled for delivery of the Secure Access Code
 - If you had your One Time Passcodes setup to call your office with a phone line extension, this feature is no longer available. You must input your direct line for the voice call message to be accessed
- Business Company Administrators should review:
 - Sub user rights and permissions
 - **Wire templates**-The recipient address is now a required field. Please review all recipients to ensure an address is in place. Missing information in the address fields defaulted to:
 - **Missing Country defaulted to “USA”**
 - **Missing State defaulted to “CA”**
 - **Missing address defaulted to “Please Update”**