MB FOUNDATION
Giving Meaning to Money®

Client Guide for Accessing Loans and Certificates Online

Welcome to a new and improved software for loans and certificates!

This guide contains information to help this transition go as smoothly as possible.

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Please contact us with any questions during this process.

620-947-3151 or info@mbfoundation.com

ACCESSING PERSONAL LOANS AND CERTIFICATES

Set up online access:

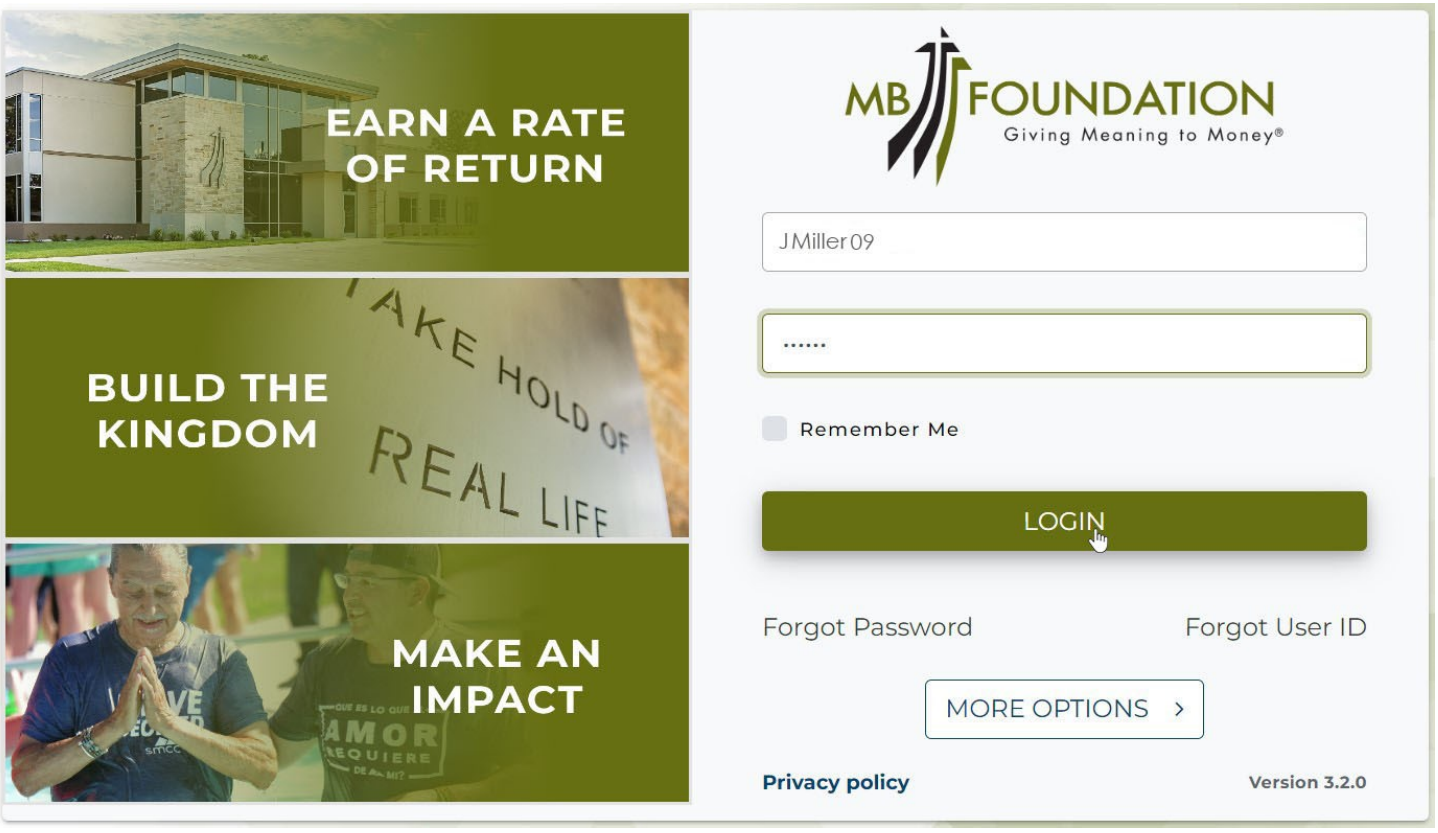
1. Receive an email with login information. (accountadmin@mbfoundation.com)

   User ID: Same username as before

   Password: Temporary Password

2. Go to mbfoundation.com and click “Login” then “View my certificate/loan”
3. Enter in the User ID and Temporary Password from email
4. Read through the “Disclaimers” sheet and click “Accept”
5. Change password and answer security questions

   Write down the questions and answers to the security questions as you will be asked to answer two of these questions each time you login.



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ACCESSING ORGANIZATION/CHURCH ACCOUNTS

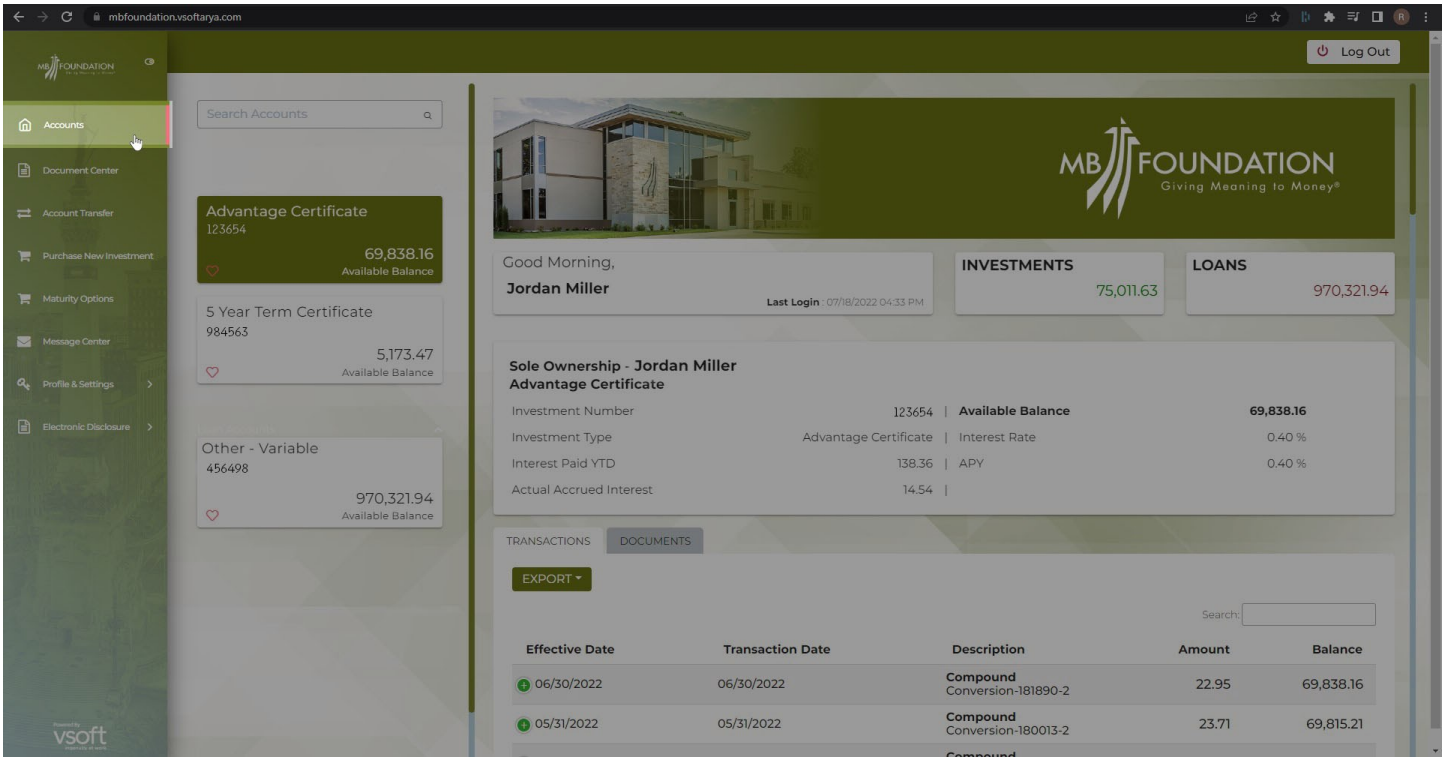
After a user has been granted permission, these are the steps to view the account:

1. **Log in to your online account**. If you do not yet have an online account, contact MB Foundation at 620-947-3151 or accountadmin@mbfoundation.com
2. **If user does not have a personal investment,** they will only see organization/ church loan and certificate information.
3. **If user does have both personal and organization/church investments and loans,** they will be listed together on the dashboard. Sort the accounts by clicking the “heart” to favorite one or the other. Utilizing the **Account Nickname** feature is another way to keep accounts organized.

DASHBOARD AT-A-GLANCE

1. Main Menu

Found on the left-hand side of the desktop screen. Select **Accounts**.



DASHBOARD AT-A-GLANCE

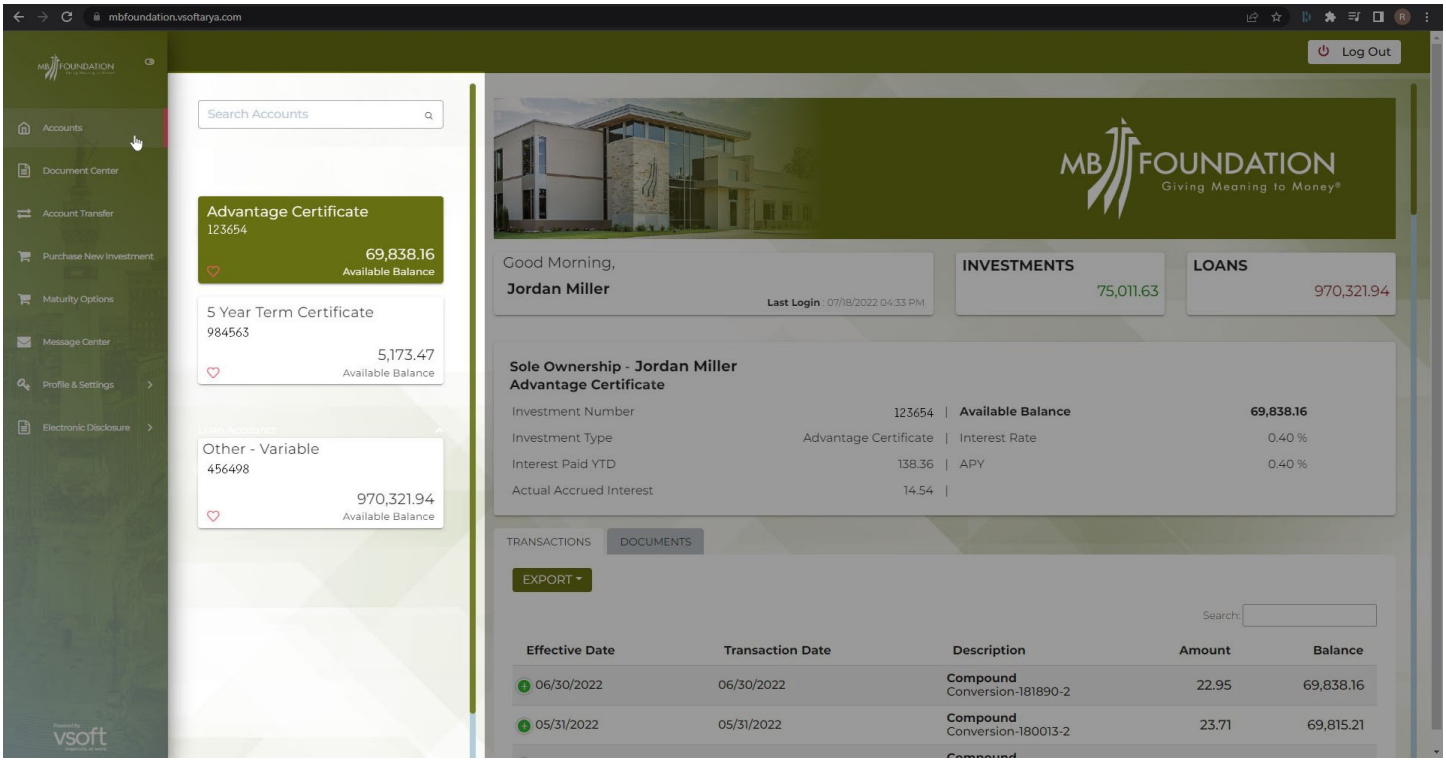
2. Accounts Menu

The middle section lists all of the accounts you have access to

Using the nickname feature can make viewing accounts easier. (nickname instructions are included in this PDF and at mbfoundation.com/onlineaccess)

Notes:

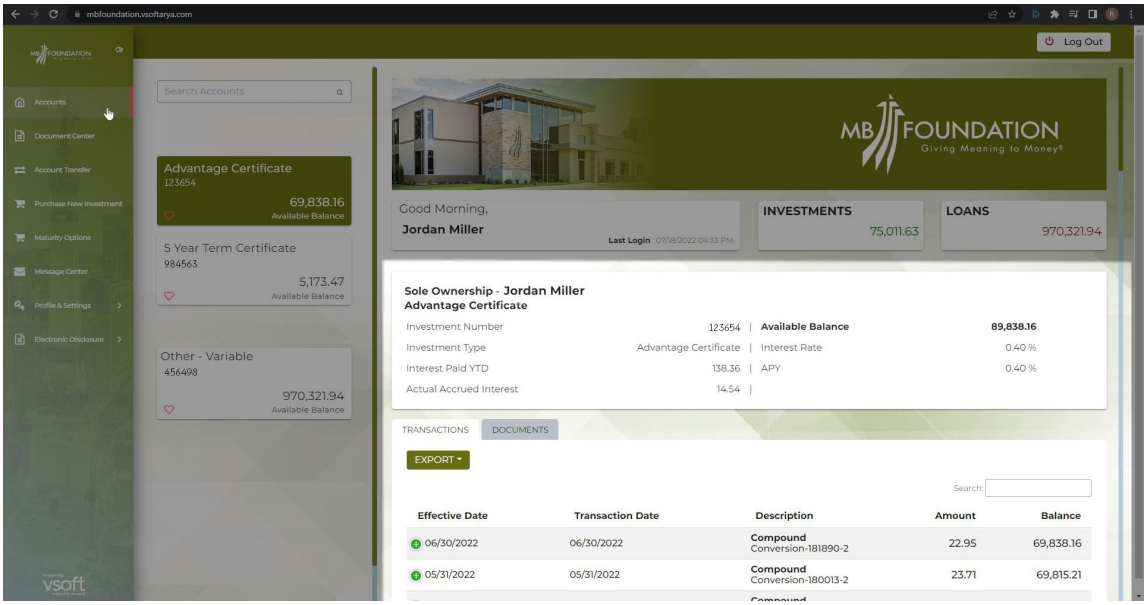
1. Selecting the heart icon will favorite an account and bring it to the top.
2. Use the scroll bar to access accounts out of view.
3. The account highlighted in green will display further information in the window to the right.



DASHBOARD AT-A-GLANCE

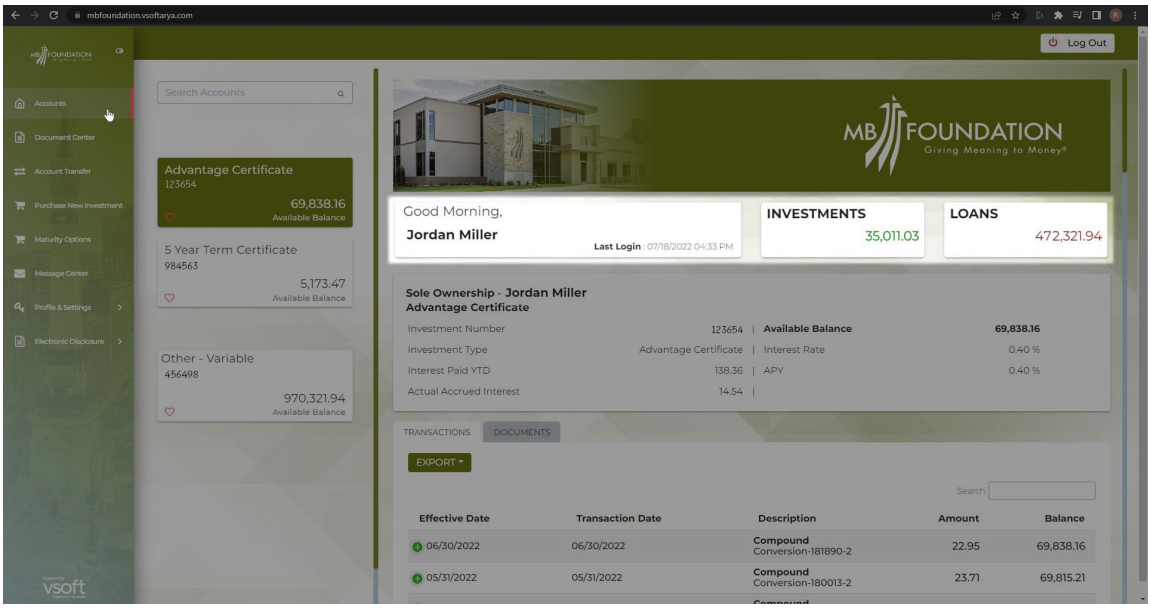
3. Account Information

The right-hand section will display the details of the account selected in green. This is where transactions and account details such as owner, type, rate, etc.



4. TOP BAR

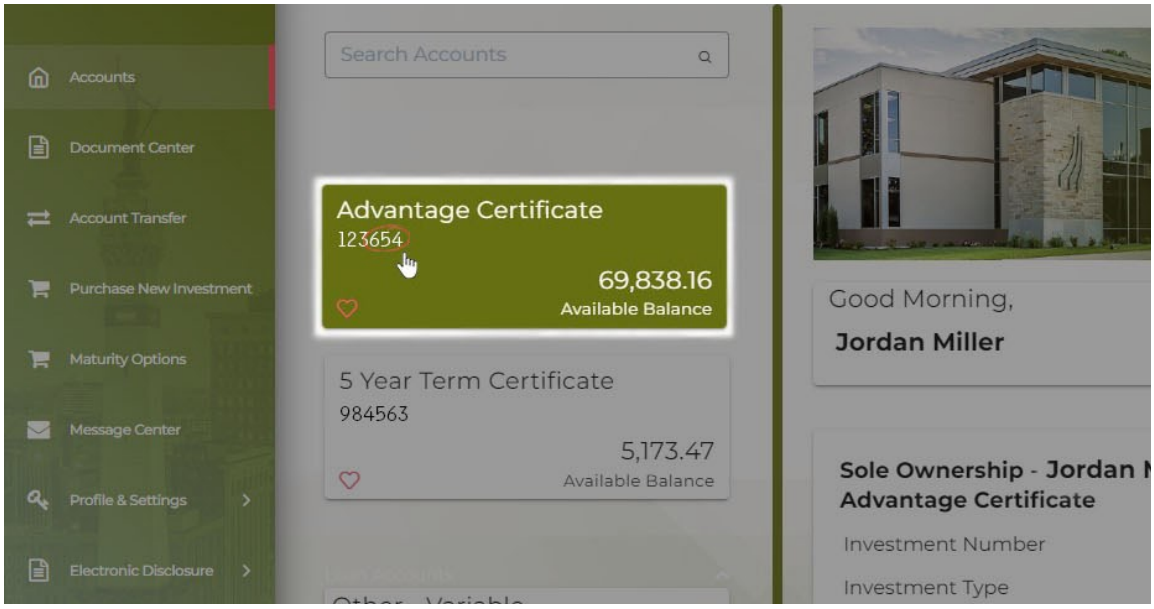
The top summary bar will have the cumulative total of all accounts you have access to for loans and investments.



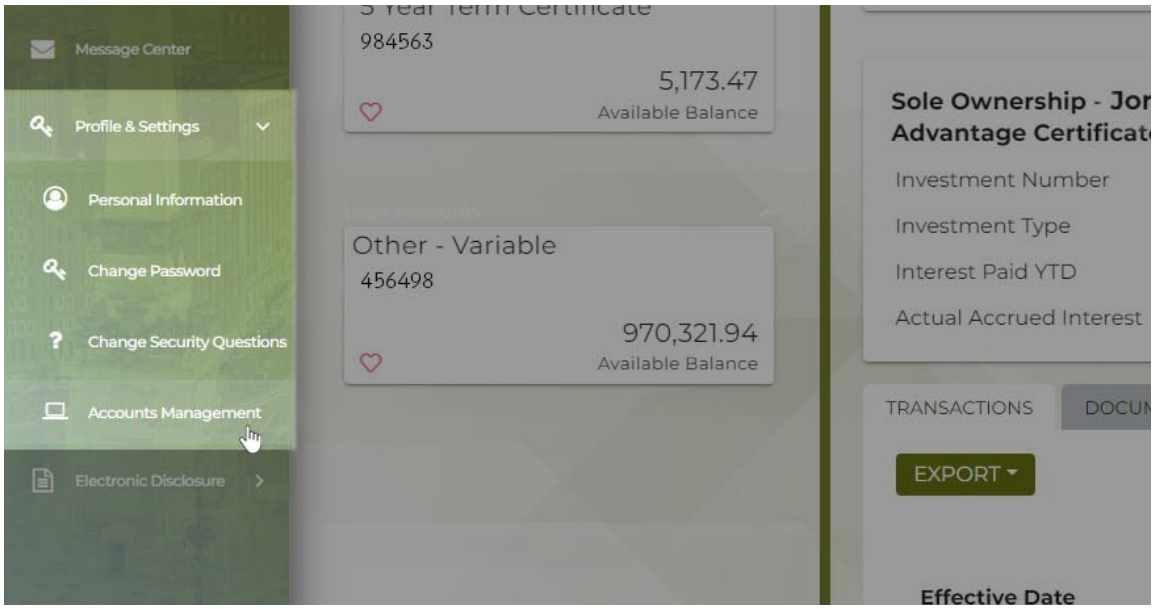
ACCOUNT NICKNAMES

Steps:

1. Click the “Accounts” tab in the left-hand menu.
2. Find the account you’ll be creating a nickname for and make note of the last 3 digits of the account number.

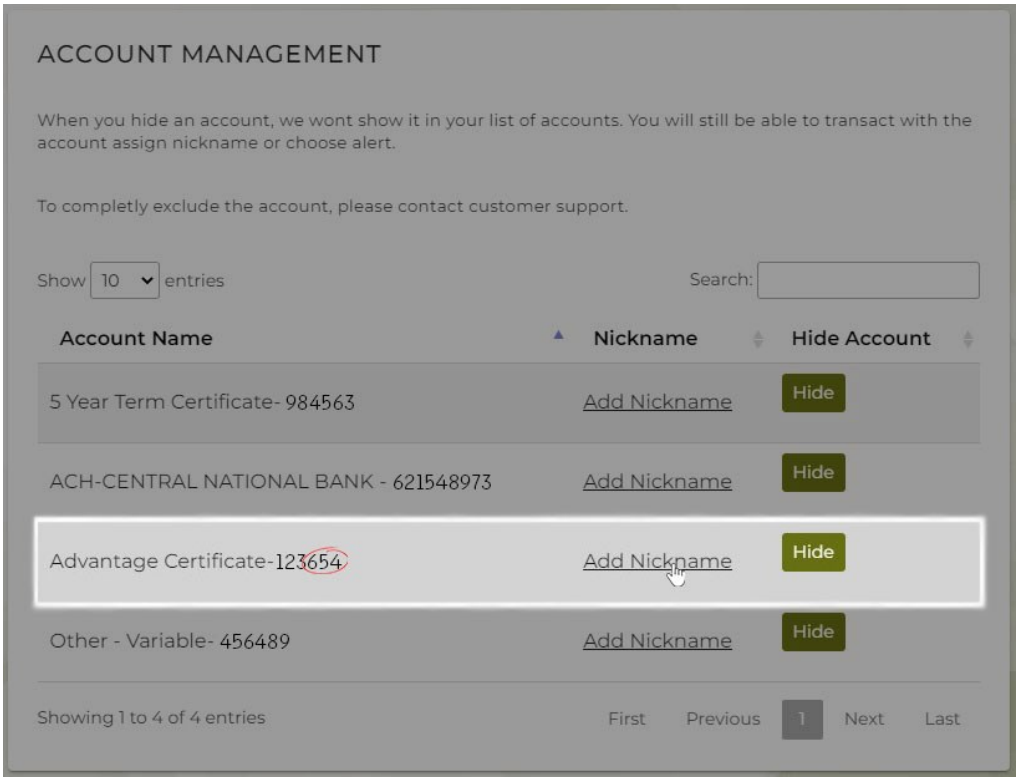


3. Click the “Profile & Settings” tab and go to “Accounts Management”



ACCOUNT NICKNAMES

4. Find the certificate or loan that matches the 3-digit account you want to nickname



5. Click “Add Nickname” and type in a custom nickname.

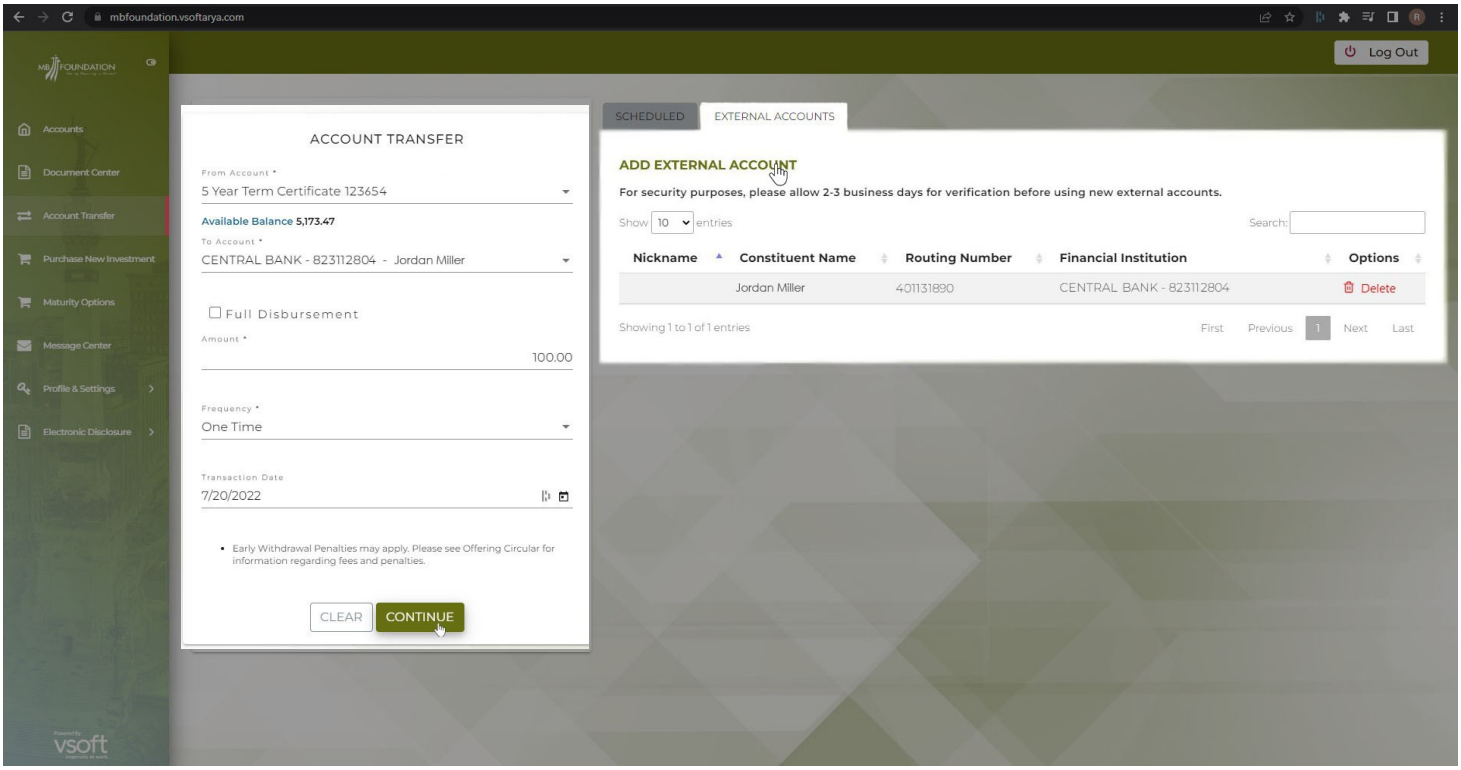
TRANSFERRING MONEY

Setting up External Accounts:

1. Go to “Account Transfer”
2. Click the “External Accounts” tab
3. Click “Add External Account”

Transferring Money:

1. Indicate which account you’d like to transfer FROM and the account you’d like to transfer TO
2. Select the **amount**, the **frequency** and the **date**. Click **continue**, confirm the details, and click **confirm** when everything is correct.
3. Examine what (if any) recurring transactions are set up by clicking on the “Scheduled” tab.



ACCESSING STATEMENTS

Steps:

1. Select the account from the dashboard to view details
2. Click “Documents” right next to “Transactions”
3. Download a PDF by clicking on the green “Download” button for the appropriate statement.

Notes: Statement file names are titled with the investment account number, date and time when the statement was created.

Format: Account Number– Investment Statement - YYYYMMDD00HHMM.

DOWNLOADING YOUR 1099

Steps:

1. Navigate to the “Document Center” in the left-hand menu
2. Download a PDF of your 1099 by licking on the “Download” button on the right.

Please Note:

Documents are not listed in chronological or alphabetical order.

Instead, 1099 file names are titled with the account name, “IRS 1099-INT”, date and time when the 1099 was created (not the date range of the 1099).

Format: Account Name - IRS 1099-INT - YYYYMMDD00HHMM.pdf