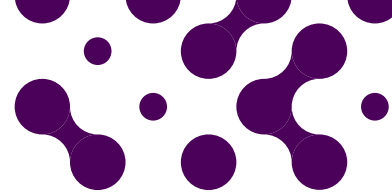


Text Messaging Implementation



Overview

There are two types of text messages your institution can utilize: Marketing and Operational.

Marketing communications can include promotions and account offerings, information on community events, financial education resources, etc. These texts require Opt-In and Opt-Out options.

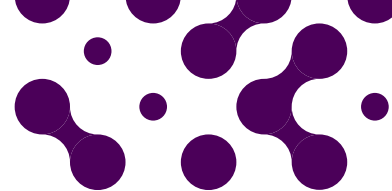
Examples of marketing texts:

- Grow your savings this holiday season! Earn up to 4.25% APY for 12 months with our limited time Holiday CD Special.
- Our annual Fall Festival is on Saturday, October 19 from 10-11:30am at our Main Street branch. Join us at 123 Main Street for free family fun!

Operational communications focus on activity such as alerts on balance drops, purchases made, branch closures, etc. These require only an Opt-In option.

Examples of operational texts:

- Due to inclement weather, all Marquis Federal locations will be closing at 2:00pm today. We plan to resume normal operating hours tomorrow.
- Marquis Federal has processed your deposit of \$XXXX on xx/xx/xx. \$XXXX is now available. Visit Online Banking for details.



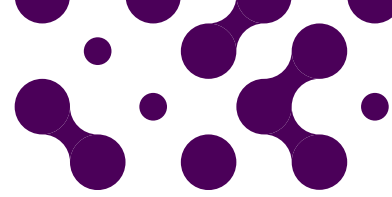
Setup

We will assign separate toll-free numbers for your marketing and/or operational texts:

- Marketing texts are sent via your Marketing DCP account.
- Operational texts are sent via your Operational/Transactional DCP account.

To assign you a toll-free number, we require specific information related to:

- Verifying your organization
 - General institution details and contact information. We will create a Business Profile to verify you as a trusted sender with our texting vendor.
- Providing Opt-In Disclosure Details
 - Customer consent is crucial for texting relationships. A URL or Image is required showing how/where a customer agrees to receive text messages.
 - Can be a link to an opt-in on your website, or an uploaded image/screenshot from your online banking portal or paper form, etc.
 - Please note consent cannot be grouped into your general Customer Agreement.
- Keyword and Message Content
 - We recommend a corresponding opt-out keyword for each opt-in keyword.
 - For example: Marquis / MarquisSTOP



Preparing & Submitting Info via Text Web Form

Details of the above points will be submitted to Marquis via Text Web Form:

[Part 1 - Business Information](#) – Submit this information first to initiate your Business Profile.

[Part 2 – Text Message Setup](#) – This section will require specific details regarding usage and collecting opt-ins; this may take more time and planning from your internal team.

**Since there are several items to consider for the text message setup portion, an excel version of the questionnaire will be provided to help you prepare and document the necessary information. We find compiling the data beforehand makes entry into the Web Form smoother and more efficient.*

Please be thorough with your responses and complete the Web Form in its entirety.

Submission of the Web Form is mandatory to begin the approval process.

Marquis will handle the setup and approval process with mobile carriers. The full setup may take four to six weeks after submission with our vendor.

Support Resources

After the toll-free numbers are in place, you are free to start building and sending text communications. The link below will direct you to our online Help Center where you can find step-by-step guides on building and launching Marketing and Operational texts through your DCP.

<https://help.gomarquis.com/hc/en-us/articles/19585989331227>

A coaching session with our Learning & Development team can be requested by emailing coaching@gomarquis.com. If you run into any issues or need assistance, our Support team can be reached at dsupport@gomarquis.com or 877-362-8628.