## **Zelle**®

## [Company Name] with Zelle® Zelle is a fast, safe and easy way to get your money electronically

#### Receive money using just an email address or U.S. mobile number.

**EASY** 

If you're already using Zelle to send and receive money with friends, just provide [Company Name] with the email address or U.S.

#### If you've never used Zelle, you can enroll to receive your [reimbursement] in just a few simple steps.

Since money is sent electronically, you can easily keep tabs on your payment online. No wondering when your check will arrive in the mail. You're also saving paper and the environment!

mobile number you enrolled with *Zelle*, no additional steps needed<sup>2</sup>.

How it Works

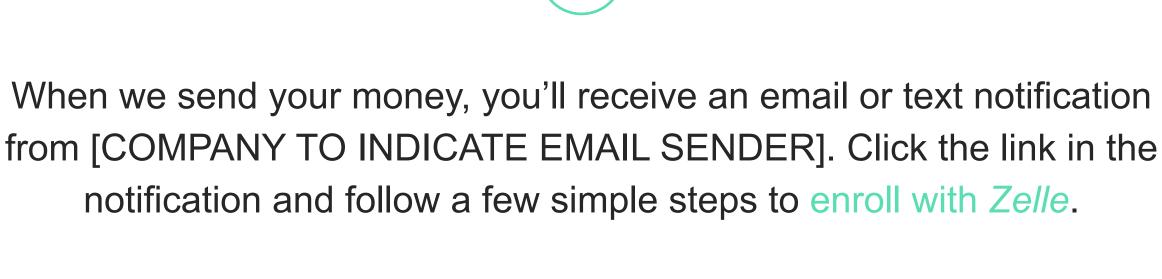
Provide us with your email address or U.S. mobile number so we know

where to send your payment. No need to share sensitive bank account

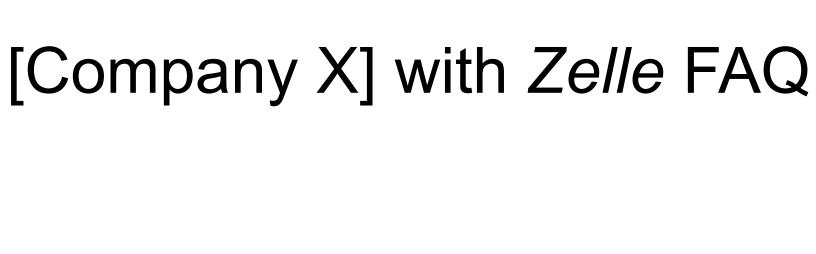
details with us – we only need your email address or U.S. mobile

number to send you money.





You're ready to receive your [reimbursement] directly into your bank account! (No trips to the mailbox necessary.)



across the U.S. Provide [Company Name] with your email address or U.S. mobile phone number, enroll with Zelle, and

2. What are the benefits of receiving my payment with *Zelle*?

Enrolling to receive your money with Zelle is simple, and there are so many benefits!

**SAFE** – Receive money using just an email address or U.S. mobile number.

3. How do I enroll to receive money with *Zelle*?

[Company Name] can send your money electronically, regardless of where you bank. With Zelle, money is sent directly to your

**FAST** – No need to wait for a check or prepaid card to arrive in the mail, your money will be sent directly to your bank account.

**EASY** – If you've never used *Zelle*, you can enroll to receive your money in just a few simple steps. If you're already using

Zelle to send and receive money with friends, just provide the email address or U.S. mobile number you enrolled with Zelle to

Visit [landing page URL to opt-in to receive electronic payments from Company Name] and select the option to receive your

Note: If you're already enrolled with Zelle, you don't need to do anything else<sup>2</sup>. You'll receive an email or text message letting

If you're not yet enrolled with Zelle, you will receive an email or text notification from [Company to Indicate Email Sender] with

The link included in the email or text notification will take you to clearxchange.com/receive to check if your financial

institution offers Zelle (clearXchange® is the online version of Zelle used for receiving payments from companies —

payment from [Company Name] with Zelle. Provide your email address or U.S. mobile number to [Company Name] so we

# Zelle is a fast, safe and easy way to receive money directly to your bank account, and it's offered by banks and credit unions

Just follow the simple steps below. **STEP 1: PROVIDE US WITH YOUR INFO** 

know where to send your payment.

**STEP 3: RECEIVE YOUR MONEY** 

clearXchange.com?

7. Who do I call for help?

8. Is my information secure?

Zelle.

Your payment should arrive in 1 - 3 business days.

- 3 business days.

[Company Name] and you're done!<sup>2</sup>

1. What is Zelle?

bank account so you don't have to wait for a check in the mail.

you know your payment will be sent to your bank account. To ensure you receive your money from [Company Name], make sure you provide [Company Name] with the same email address or U.S. mobile number you enrolled with Zelle. **STEP 2: ENROLL WITH ZELLE** 

instructions on how to complete your enrollment with Zelle.

email address or U.S. mobile number you provided to [Company Name].

4. When will my payment show up in my bank account?

5. What if my financial institution doesn't offer *Zelle*?

the Zelle app or enroll with Zelle through a participating financial institution.

Please contact [Company Name's] customer support team at XXX-XXX-XXXX.

clearXchange.com will soon become Zelle). Select your bank or credit union from the list and follow the steps to enroll with Zelle directly through your financial institution. If your bank isn't listed, no problem! You can enroll to receive your payment through clearXchange.com. Select "My bank isn't listed" and follow the steps to enroll to receive your money with clearXchange. You'll be prompted to verify your email or U.S. mobile number to confirm that you have access to it.

\*Important note: To ensure you receive your money from [Company Name], make sure you enroll with Zelle using the same

Once you've completed your Zelle enrollment, your payment will be sent to your bank account. Your payment should arrive in 1

You can still receive your payment electronically by visiting clearxchange.com/receive and clicking "My bank isn't listed." (clearXchange is the online version of Zelle used for receiving payments from companies — clearXchange.com will soon become Zelle). Follow the steps to enroll your email address or mobile number, provide the requested personal information, and complete your enrollment.

clearXchange is the online version of Zelle used for receiving payments from companies. clearXchange.com will soon become

You can only use clearXchange.com to receive money. If you would like to send money using Zelle, you can either download

Keeping your money and information safe is a top priority. When you use Zelle within your financial institution's mobile app or

What if I accidentally deleted the email or text message telling me to

online banking, your information is protected with the same technology they use to keep your bank account safe.

6. What is clearXchange? Can I send money with Zelle if I enroll at

If you enroll at clearXchange.com (the online version of Zelle used to receive money from companies) your private information is protected by industry leading AES encryption when it's stored and SSL encryption in transit.

How does *Zelle* work?

Don't worry! Just visit clearxchange.com/receive and follow the simple steps to enroll with Zelle.

#### When you enroll with Zelle, your name, the name of your bank and the email address or U.S. mobile number you enrolled is shared with Zelle. When [Company Name] sends money to your enrolled email address or U.S. mobile number, Zelle looks

enroll with Zelle?

9. Are there any fees to receive my money using *Zelle*? [Company Name] does not charge any fees to receive money with Zelle. [NOTE: TO BE MODIFIED BY COMPANY IF FEES ARE APPLICABLE. EARLY WARNING DOES NOT DICTATE FEES TO CONSUMERS].

up the email address or mobile number in its "directory" and notifies your financial institution of the incoming payment. Your financial institution then directs the payment into your bank account.

If your financial institution offers Zelle (click here for a list of participating banks), log into your financial institution's mobile banking app and find Zelle. Follow the simple steps to enroll your preferred email address or U.S. mobile number. If your email address or U.S. mobile number is already enrolled, you'll receive a notification in your financial institution's app.

How do I find out if I'm already enrolled with Zelle?

Alternatively, you can call your financial institution's customer support and ask them to help you. If your financial institution does not offer Zelle, call Zelle customer support at 844-428-8542 and they can determine whether you're already enrolled with Zelle.

FOOTER

Zelle and the Zelle related marks are wholly owned by Early Warning Services, LLC and are used herein under license.

Enrollment required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary.

<sup>1</sup> Must have a bank account in the U.S. to use *Zelle*.

<sup>2</sup> If your financial institution doesn't offer Zelle and you are already enrolled in the Zelle app, ask your financial institution about your daily transaction limit for your debit card. If the payment you anticipate receiving from us exceeds your daily limit, contact us to discuss other payment options.

# Get electronic notification of payment and eliminate the possibility of your check getting lost or stolen in the mail.

No need to wait for a check or prepaid card to arrive in the mail, your money will be sent directly to your bank account.

**FAST SAFE** 

# Benefits to Receiving Your [Reimbursement] with Zelle

- Zelle is a fast, safe and easy way to receive money directly to your bank account, and it's offered by banks and credit unions across the U.S. Provide [Company Name] with your email address or U.S. mobile phone number, enroll with Zelle, and [Company Name] can send your money electronically, regardless of where you bank<sup>1</sup>. With Zelle, money is sent directly to your bank account so you don't have to wait for a check in the mail.
- Receive Your [Reimbursement] from

## 1 Zelle

## Receive Your [Reimbursement] from [Company Name] with Zelle®

## Zelle is a fast, safe and easy way to get your money electronically

Zelle is a fast, safe and easy way to receive money directly to your bank account, and it's offered by banks and credit unions across the U.S. Provide [Company Name] with your email address or U.S. mobile phone number, enroll with Zelle, and [Company Name] can send your money electronically, regardless of where you bank<sup>1</sup>. With Zelle, money is sent directly to your bank account so you don't have to wait for a check in the mail.

## Benefits to Receiving Your [Reimbursement] with Zelle

#### **FAST**

No need to wait for a check or prepaid card to arrive in the mail, your money will be sent directly to your bank account.

#### SAFE

Receive money using just an email address or U.S. mobile number.

• Get electronic notification of payment and eliminate the possibility of your check getting lost or stolen in the mail.

#### **EASY**

- If you've never used *Zelle*, you can enroll to receive your [reimbursement] in just a few simple steps. • If you're already using Zelle to send and receive money with friends, just provide [Company Name] with the email address or U.S.
- mobile number you enrolled with Zelle, no additional steps needed2. Since money is sent electronically, you can easily keep tabs on your payment online. No wondering when your check will arrive in
- the mail. You're also saving paper and the environment!

## How it Works



Provide us with your email address or U.S. mobile number so we know where to send your payment. No need to share sensitive bank account details with us – we only need your email address or U.S. mobile number to send you money.

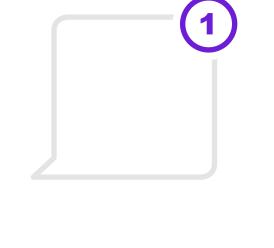








When we send your money, you'll receive an email or text notification from [COMPANY TO INDICATE EMAIL SENDER]. Click the link in the notification and follow a few simple steps to enroll with Zelle.





You're ready to receive your [reimbursement] directly into your bank account! (No trips to the mailbox necessary.)



# [Company X] with Zelle FAQ

#### 1. What is Zelle? Zelle is a fast, safe and easy way to receive money directly to your bank account, and it's offered by banks and credit unions

across the U.S. Provide [Company Name] with your email address or U.S. mobile phone number, enroll with Zelle, and [Company Name] can send your money electronically, regardless of where you bank. With Zelle, money is sent directly to your bank account so you don't have to wait for a check in the mail.

#### 2. What are the benefits of receiving my payment with *Zelle*? Enrolling to receive your money with *Zelle* is simple, and there are so many benefits! FAST - No need to wait for a check or prepaid card to arrive in the mail, your money will be sent directly to your bank account.

**SAFE** – Receive money using just an email address or U.S. mobile number. EASY – If you've never used Zelle, you can enroll to receive your money in just a few simple steps. If you're already using

Zelle to send and receive money with friends, just provide the email address or U.S. mobile number you enrolled with Zelle to [Company Name] and you're done!<sup>2</sup>

#### 3. How do I enroll to receive money with *Zelle*? Just follow the simple steps below.

#### **STEP 1: PROVIDE US WITH YOUR INFO** Visit [landing page URL to opt-in to receive electronic payments from Company Name] and select the option to receive your

know where to send your payment. Note: If you're already enrolled with Zelle, you don't need to do anything else<sup>2</sup>. You'll receive an email or text message letting you know your payment will be sent to your bank account. To ensure you receive your money from [Company Name], make

payment from [Company Name] with Zelle. Provide your email address or U.S. mobile number to [Company Name] so we

sure you provide [Company Name] with the same email address or U.S. mobile number you enrolled with Zelle. **STEP 2: ENROLL WITH ZELLE** If you're not yet enrolled with Zelle, you will receive an email or text notification from [Company to Indicate Email Sender] with instructions on how to complete your enrollment with Zelle.

• The link included in the email or text notification will take you to clearxchange.com/receive to check if your financial institution offers Zelle (clearXchange® is the online version of Zelle used for receiving payments from companies —

- clearXchange.com will soon become Zelle). Select your bank or credit union from the list and follow the steps to enroll with Zelle directly through your financial institution.
- If your bank isn't listed, no problem! You can enroll to receive your payment through clearXchange.com. Select "My bank isn't listed" and follow the steps to enroll to receive your money with clearXchange. • You'll be prompted to verify your email or U.S. mobile number to confirm that you have access to it.
- \*Important note: To ensure you receive your money from [Company Name], make sure you enroll with Zelle using the same email address or U.S. mobile number you provided to [Company Name].
- **STEP 3: RECEIVE YOUR MONEY** Once you've completed your Zelle enrollment, your payment will be sent to your bank account. Your payment should arrive in 1

## 3 business days.

# Your payment should arrive in 1 - 3 business days.

4. When will my payment show up in my bank account?

5. What if my financial institution doesn't offer Zelle?

#### You can still receive your payment electronically by visiting clearxchange.com/receive and clicking "My bank isn't listed." (clearXchange is the online version of *Zelle* used for receiving payments from companies — clearXchange.com will soon become Zelle). Follow the steps to enroll your email address or mobile number, provide the requested personal information,

and complete your enrollment. 6. What is clearXchange? Can I send money with Zelle if I enroll at

#### clearXchange.com? clearXchange is the online version of Zelle used for receiving payments from companies. clearXchange.com will soon become

You can only use clearXchange.com to receive money. If you would like to send money using Zelle, you can either download the Zelle app or enroll with Zelle through a participating financial institution.

# Please contact [Company Name's] customer support team at XXX-XXX-XXXX.

7. Who do I call for help?

#### Keeping your money and information safe is a top priority. When you use Zelle within your financial institution's mobile app or online banking, your information is protected with the same technology they use to keep your bank account safe. If you enroll at clearXchange.com (the online version of Zelle used to receive money from companies) your private information

8. Is my information secure?

is protected by industry leading AES encryption when it's stored and SSL encryption in transit. 9. Are there any fees to receive my money using *Zelle*?

[NOTE: TO BE MODIFIED BY COMPANY IF FEES ARE APPLICABLE. EARLY WARNING DOES NOT DICTATE FEES TO

## CONSUMERS].

[Company Name] does not charge any fees to receive money with Zelle.

10. What if I accidentally deleted the email or text message telling me to enroll with Zelle?

Don't worry! Just visit clearxchange.com/receive and follow the simple steps to enroll with Zelle.

How does Zelle work? When you enroll with Zelle, your name, the name of your bank and the email address or U.S. mobile number you enrolled is shared with Zelle. When [Company Name] sends money to your enrolled email address or U.S. mobile number, Zelle looks up the email address or mobile number in its "directory" and notifies your financial institution of the incoming payment. Your

## financial institution then directs the payment into your bank account.

How do I find out if I'm already enrolled with Zelle?

If your financial institution offers Zelle (click here for a list of participating banks), log into your financial institution's mobile

banking app and find Zelle. Follow the simple steps to enroll your preferred email address or U.S. mobile number. If your

email address or U.S. mobile number is already enrolled, you'll receive a notification in your financial institution's app.

Alternatively, you can call your financial institution's customer support and ask them to help you.

If your financial institution does not offer Zelle, call Zelle customer support at 844-428-8542 and they can determine whether you're already enrolled with *Zelle*.

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Enrollment required. Payments can arrive as quickly as minutes or may take up to three business days. Actual times may vary.

<sup>1</sup> Must have a bank account in the U.S. to use *Zelle*.

<sup>2</sup> If your financial institution doesn't offer Zelle and you are already enrolled in the Zelle app, ask your financial institution about your daily transaction limit for your debit card. If the payment you anticipate receiving from us exceeds your daily limit, contact us to discuss other payment options.

## **TEXT AND COLOR**

- The template uses *Zelle* colors (purple, green, etc.) and standard web fonts (Arial and Arial Black). You can either: • Keep these colors and fonts as they are in the template (color values are on p. 27 of the *Zelle* Brand Playbook for Partners), or
- Replace both the colors and the fonts with your company color palette. If you choose this option, we recommend neutral colors or colors that complement the Zelle logo displayed at the top of the wireframe. Please retain the white background and black text. The header colors, hyperlink text, divider lines, bullets, and numbers can be customized to
  - match your company site and color palette.
- No photography should be used on your Zelle landing page.

#### **HEADER**

- 1. Insert Zelle logo here. 2. Customize text to describe the type of payment consumers will receive from your company.
- Examples: Reimbursement, Claim, Refund, Payment, Money 3. Personalize all [Company Name] references with your company name.
- 4. If preferred, the subhead copy ("Zelle is a fast, safe and easy way to get your money electronically") can be replaced with one of the following approved options:

Stop waiting for checks in the mail – thanks to [Company Name] with Zelle®

Enroll to receive your money electronically in just a few simple steps

**BENEFITS** 

5. The text in this section is pre-approved and the actual language cannot be edited. Bullets underneath each benefit can be reordered or deleted to best align with your company's objectives.

#### **HOW IT WORKS**

colors and fonts).

- 6. "How it Works" can be displayed in one of three ways:
- Text only, using the approved copy referenced on the left. No images should be displayed if you select the text only option.

• The "How it Works" infographic images\* can be dropped directly into your CMS and displayed as shown in this template.

- The "How it Works" infographic images\* can be displayed in an image carousel if your site offers this functionality. \*The "How it Works" images are provided separately. This includes the encircled numbers for steps 1-3 as well as the graphics
- that go underneath each step. The following options are provided: Zelle-colored, PNG file format — these can be dropped directly into your company site and are not editable. Use this option if you have elected to preserve the Zelle branding shown in the template (i.e., you are not applying your company
- Neutral-colored, PNG file format these can be dropped directly into your company site and are not editable. Use this option if you are applying your company branding (colors, fonts, etc.).

7. "Enroll with Zelle" — Insert link to #3 in the FAQ section below

## **FAQS**

Zelle FAQs page. FAQs can be displayed using basic functionality (as displayed in the template) or using dropdown functionality in which the questions are displayed and the user can click each question to display the answer underneath.

8. Display all FAQs relevant to your company either at the bottom of your company's Zelle landing page, or on a dedicated

## NOTE:

If this template is used for mobile it should be responsive, meaning all modules should stack.