## Żelle

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

## Zelle<sup>®</sup> is a fast, safe and easy way to get your money electronically

Zelle<sup>®</sup> 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<sup>®</sup>, and [Company Name] can send your money electronically, regardless of where you bank<sup>1</sup>. With Zelle<sup>®</sup>, 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, no bank account details needed.
- Get electronic notification of payment and eliminate the possibility of your check getting lost or stolen in the mail. •

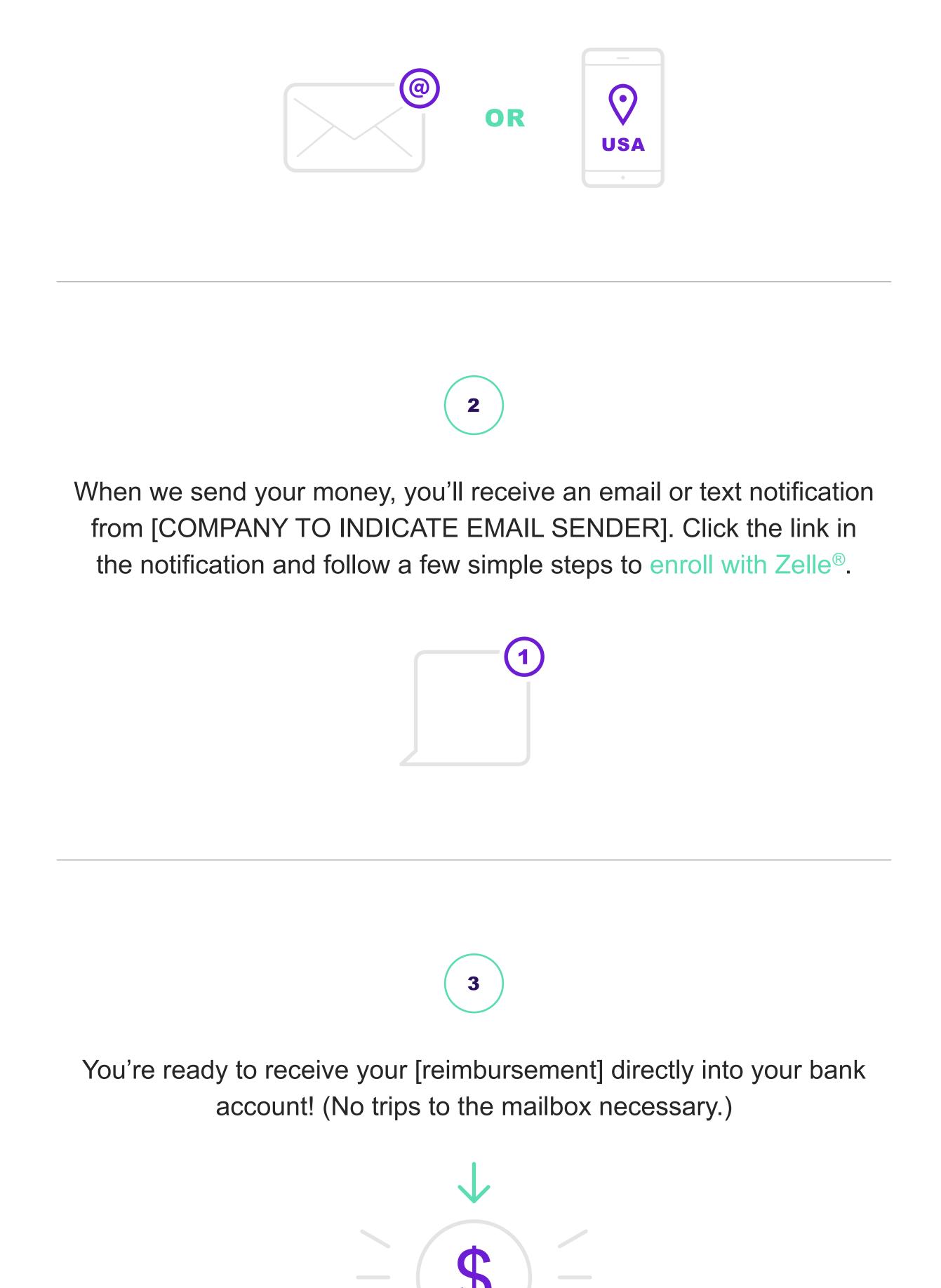
#### EASY

- If you've never used Zelle<sup>®</sup>, 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<sup>®</sup>, no additional steps needed<sup>2</sup>.
- 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.



## [Company X] with Zelle<sup>®</sup> FAQ

## 1. What is Zelle<sup>®</sup>?

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<sup>®</sup>, 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<sup>®</sup>?

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, no bank account details needed.

EASY – If you've never used Zelle<sup>®</sup>, 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<sup>®</sup>?

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 payment from [Company Name] with Zelle<sup>®</sup>. Provide your email address or U.S. mobile number to [Company Name] so we know where to send your payment.

Note: If you're already enrolled with Zelle<sup>®</sup>, 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 sure you provide [Company Name] with the same email address or U.S. mobile number you enrolled with Zelle<sup>®</sup>.

#### **STEP 2: ENROLL WITH ZELLE®**

If you're not yet enrolled with Zelle<sup>®</sup>, you will receive an email or text notification from [Company to Indicate Email and Text Sender] with instructions on how to complete your enrollment with Zelle<sup>®</sup>.

- The link included in the email or text notification will take you to enroll.zellepay.com to check if your financial institution offers Zelle<sup>®</sup>.
- 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 still use Zelle<sup>®</sup> by downloading the Zelle<sup>®</sup> app for Android or iOS<sup>2</sup>. To enroll with the Zelle<sup>®</sup> app, enter your basic contact information, an email address and U.S. mobile number, and a Visa<sup>®</sup> or Mastercard<sup>®</sup> debit card with a U.S. based account.
- You'll be prompted to verify your email or U.S. mobile number to confirm that you have access to it. ٠

\*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<sup>®</sup> enrollment, your payment will be sent to directly to your bank account in minutes<sup>1</sup> with no stops in between.

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

Your payment will be sent directly to your bank account in minutes<sup>1</sup>.

## 5. What if my financial institution doesn't offer Zelle<sup>®</sup>?

You can still use Zelle<sup>®</sup> by downloading the Zelle<sup>®</sup> app for Android or iOS<sup>2</sup>. To enroll with the Zelle<sup>®</sup> app, enter your basic contact information, an email address and U.S. mobile number, and a Visa® or Mastercard® debit card with a U.S. based account. Follow the steps to enroll your email address or mobile number, provide the requested personal information, and complete your enrollment.

## 6. Who do I call for help?

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

## 7. Is my information secure?

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.

## 8. Are there any fees to receive my money using Zelle<sup>®</sup>?

[Company Name] does not charge any fees to receive money with Zelle<sup>®</sup>.

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

## 9. What if I accidentally deleted the email or text message telling me to enroll with Zelle<sup>®</sup>?

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

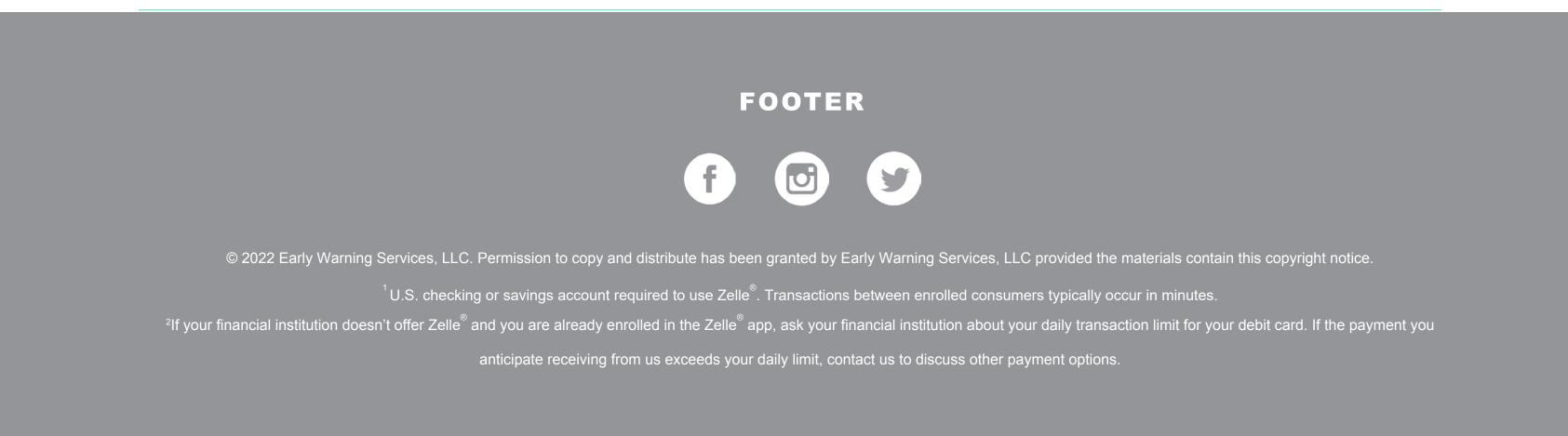
#### How does Zelle<sup>®</sup> work? 10.

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<sup>®</sup>. When [Company Name] sends money to your enrolled email address or U.S. mobile number, Zelle<sup>®</sup> 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? 11.

If your financial institution offers Zelle<sup>®</sup> (click here for a list of participating banks), log into your financial institution's mobile banking app and find Zelle<sup>®</sup>. 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<sup>®</sup>.



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# Receive Your [Reimbursement] from Icompany Name] with Zelle<sup>®</sup>

2

Zelle<sup>®</sup> is a fast, safe and easy way to get your money electronically

Zelle<sup>®</sup> 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<sup>®</sup>, and [Company Name] can send your money electronically, regardless of where you bank<sup>1</sup>. With Zelle<sup>®</sup>, money is sent directly to your bank account so you don't have to wait for a check in the mail.

## **5** Benefits to Receiving Your [Reimbursement] with Zelle<sup>®</sup>

#### 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, no bank account details needed.
- 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<sup>®</sup>, 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<sup>®</sup>, no additional steps needed<sup>2</sup>.
- 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!



# 1

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.

#### **TEXT AND COLOR**

- The template uses Zelle<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup> 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<sup>®</sup> landing page.

#### HEADER

- 1. Insert Zelle<sup>®</sup> 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<sup>®</sup> 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.

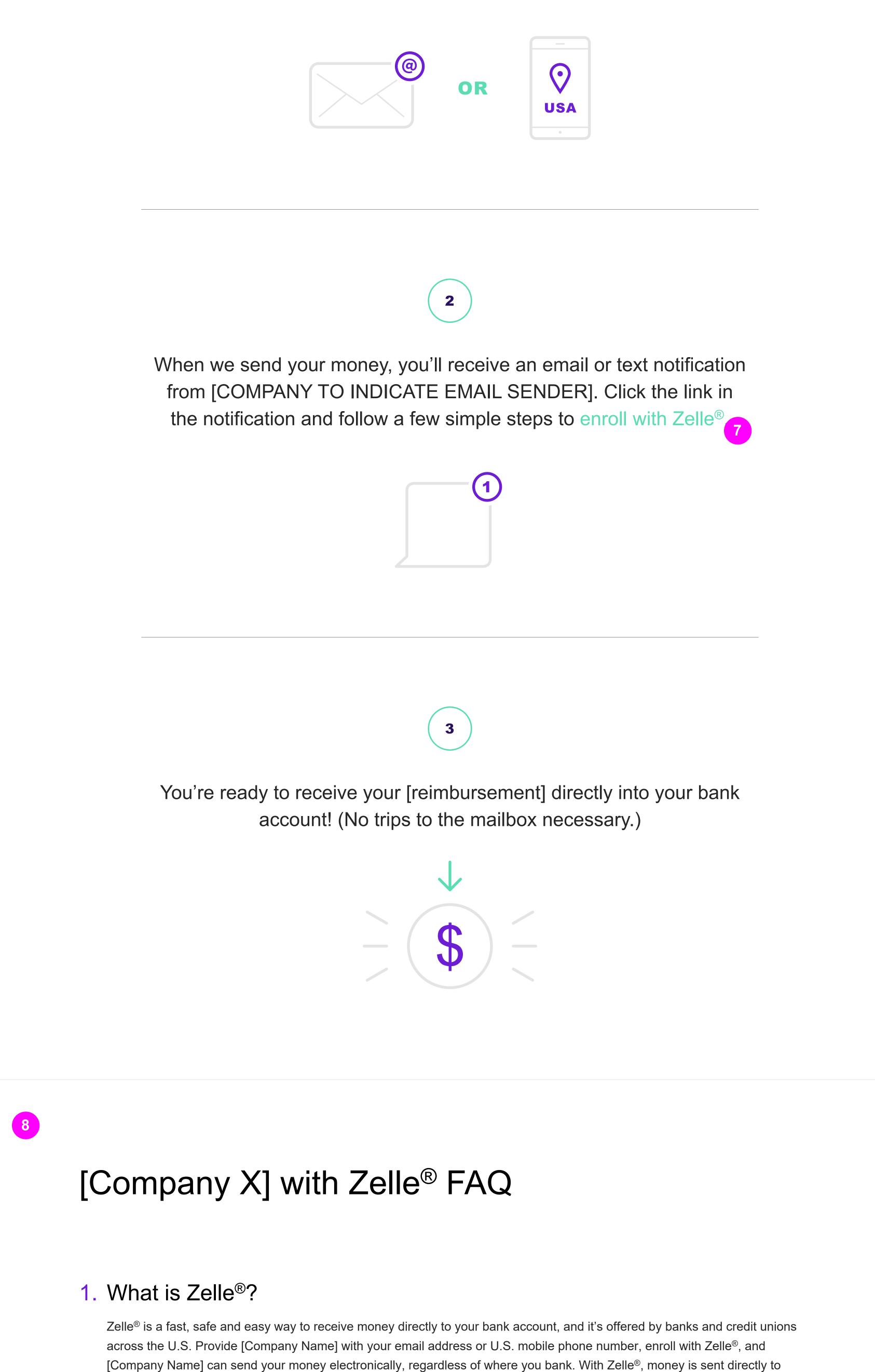
#### **HOW IT WORKS**

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<sup>®</sup> -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 colors and fonts).
- **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.).



2. What are the benefits of receiving my payment with Zelle<sup>®</sup>?

Enrolling to receive your money with Zelle<sup>®</sup> is simple, and there are so many benefits!

7. "Enroll with Zelle<sup>®</sup>" — Insert link to #3 in the FAQ section below

#### FAQS

8. Display all FAQs relevant to your company either at the bottom of your company's Zelle<sup>®</sup> landing page, or on a dedicated Zelle<sup>®</sup> FAQs page. FAQs can be displayed using basic functionality (as displayed in the template) or using drop down functionality in which the questions are displayed and the user can click each question to display the answer underneath.

#### NOTE:

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

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

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, no bank account details needed.

**EASY** – If you've never used Zelle<sup>®</sup>, you can enroll to receive your money in just a few simple steps. If you're already using Zelle<sup>®</sup> to send and receive money with friends, just provide the email address or U.S. mobile number you enrolled with Zelle<sup>®</sup> to [Company Name] and you're done!<sup>2</sup>

## 3. How do I enroll to receive money with Zelle<sup>®</sup>?

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 payment from [Company Name] with Zelle<sup>®</sup>. Provide your email address or U.S. mobile number to [Company Name] so we know where to send your payment.

Note: If you're already enrolled with Zelle<sup>®</sup>, 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 sure you provide [Company Name] with the same email address or U.S. mobile number you enrolled with Zelle<sup>®</sup>.

#### **STEP 2: ENROLL WITH ZELLE®**

If you're not yet enrolled with Zelle<sup>®</sup>, you will receive an email or text notification from [Company to Indicate Email and Text Sender] with instructions on how to complete your enrollment with Zelle<sup>®</sup>.

- The link included in the email or text notification will take you to enroll.zellepay.com/receive to check if your financial institution offers Zelle<sup>®</sup>.
- 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 still use Zelle® by downloading the Zelle® app for Android or iOS2. To enroll with the Zelle<sup>®</sup> app, enter your basic contact information, an email address and U.S. mobile number, and a Visa<sup>®</sup> or Mastercard<sup>®</sup> debit card with a U.S. based account.
- 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<sup>®</sup> enrollment, your payment will be sent to directly to your bank account in minutes1 with no stops in between.

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

Your payment will be sent directly to your bank account in minutes<sup>1</sup>.

## 5. What if my financial institution doesn't offer Zelle<sup>®</sup>?

You can still use Zelle<sup>®</sup> by downloading the Zelle<sup>®</sup> app for Android or iOS2. To enroll with the Zelle<sup>®</sup> app, enter your basic contact information, an email address and U.S. mobile number, and a Visa® or Mastercard® debit card with a U.S. based account. Follow the steps to enroll your email address or mobile number, provide the requested personal information, and complete your enrollment.

### 7. Who do I call for help?

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

## 8. Is my information secure?

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.

## 9. Are there any fees to receive my money using Zelle<sup>®</sup>?

[Company Name] does not charge any fees to receive money with Zelle<sup>®</sup>.

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## 11. How does Zelle<sup>®</sup> work?

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

## 12. How do I find out if I'm already enrolled with Zelle<sup>®</sup>?

If your financial institution offers Zelle<sup>®</sup> (click here for a list of participating banks), log into your financial institution's mobile banking app and find Zelle<sup>®</sup>. 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<sup>®</sup>, call Zelle<sup>®</sup> customer support at 844-428-8542 and they can determine whether you're already enrolled with Zelle<sup>®</sup>.

#### FOOTER



© 2022 Early Warning Services, LLC. Permission to copy and distribute has been granted by Early Warning Services, LLC provided the materials contain this copyright notice. Enrollment required. Payments can arrive as quickly as minutes. Actual times may vary.

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

<sup>2</sup> If your financial institution doesn't offer Zelle and you are already enrolled in the Zelle<sup>®</sup> 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.

#### FOOTER

Include your company's required disclaimers here. Do not bury or sandwich the Zelle<sup>®</sup> IP Disclaimer here. Do not modify any of the Zelle<sup>®</sup> disclaimers.