



Important Information for QuickBooks®, Quicken®, & Mint® Users

As Heritage Bank merges with Third Coast Bank, online banking and mobile banking systems will be transitioning over to Third Coast Bank's online platform. This new platform will be online on July 13th, 2020 and this transition will require that you make changes to your QuickBooks® or Quicken® software. Please take action to ensure a smooth transition. Conversion details are available below.

1st Action Date: July 12th, 2020, 5:00 PM CT

A data file backup and a final transaction download should be completed by this date and time. Please be sure to complete the final download before this deadline to ensure you have all of your available account history.

2nd Action Date: July 13th, 2020

This is the action date for the remaining steps on the conversion instructions. You will complete the deactivate/reactivate of your online banking connection to ensure that you get your current Quicken® or QuickBooks® accounts set up with the new connection.

Conversion instructions

Be sure to review your specific conversion instructions. Attached on website.

Intuit® aggregation services (Express Web Connect) may be interrupted for up to 3-5 business days. Users are encouraged to download a QFX/QBO file during this outage. The following services may not work during the outage:

- Quicken Win/Mac *Express Web Connect*
- QuickBooks Online *Express Web Connect*
- Mint

Please carefully review your downloaded transactions after completing the migration instructions to ensure no transactions were duplicated or missed on the register.

If you have any questions, please contact us at (855) 485-0600.