

Chase Account Management

06/25/2025 11:20 am PDT

Add New Users to your Chase Account

1. Review Specified User Information to use in Account Creation:

Name: **Wesley Lindquist**

Phone Number: **(619) 940 6526**

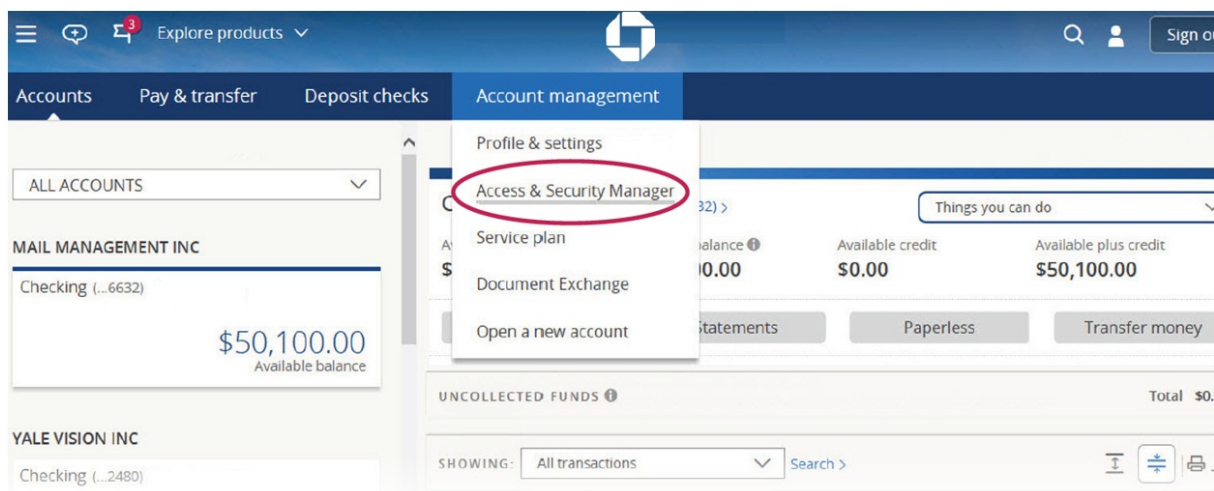
Email Address: ***This is specified in the email you received from us to initiate this new access request.***

Username: ***This is specified in the email you received from us to initiate this new access request.***

2. Access the System:

Log in with your Chase Account

Navigate to Account Management → Access and Security Manager



3. Add a new user.

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Access & Security Manager All users Activity Chase Dual Control™ IP Security Demos & user guides ▾

All users Add new user

| Name ▲ | User ID ▼ | Status ▼ | Request token ▼ | Last signed in ▼ | Mobile access ▼ | Actions |
|--------------|----------------|----------|-----------------|---------------------------|-----------------|--------------------------------------|
| JOE DEMO | joedemo123 | Active | 146893366 | Jun 20, 2017, 3:11:59 pm | | |
| RON WYATT | ronwyatt45 | Active | 123456789 | Jun 20, 2017, 2:15:34 pm | No | Edit/assign access ▾ |
| SANDRA CHANG | sandrachang123 | Active | 987654321 | Jun 13, 2017, 11:33:12 am | No | Edit/assign access ▾ |
| JOE DEMO JR | joedemo2 | Active | 663398641 | Jun 20, 2017, 3:02:26 pm | Yes | Edit/assign access ▾ |
| TED JONES | tedjones123 | Active | 135689752 | Jun 13, 2017, 1:09:52 pm | No | Edit/assign access ▾ |

4. Password and Token Code (if applicable) will need to be provided to access the next steps.

Add new user

Tell us your activation code

Mailing address

Please tell us your password and token code.

Password _____ Token code _____

5. Fill in the required information for your new user, you will need to create a Username and fill out the following details using the specified credentials below and in our account access request email to you:

First Name: **Wesley**

Last Name: **Lindquist**

Email Address: ***Specified in our email to you***

Phone Number: **(619) 940 6526**

Username: ***Specified in our email to you***

Allow mobile access: **Unselect**

Send the temporary password to: ***Specified in our email to you***

Explore products ▾

Sign out

Add new user

User information

First name

Last name

Email

Phone

+ Add Create username ⓘ

+ Add Allow mobile access ⓘ

Send temporary password to ⓘ

Choose an email address ▾

Cancel

Next

6. Create Username, uncheck "Allow Mobile Access, click "Next".

+ Add

Create username ⓘ

Send temporary password to ⓘ

7. Assign User Access Level:

AccountsPay & transferCollect & depositAccount management

Access & Security ManagerAll usersAccount activityChase Dual ControlSMIP SecurityHelp & support ▾

✓ You've added an authorized user

Be sure to give this username to JOE DEMO and tell him or her to expect an email with a temporary password to sign in for the first time.

We'll ask new users to tell us some personal information the first time they sign in.

Manage account access

JOE DEMO

| | | |
|-----------------|--------------------------|---------------|
| Username | Status | Mobile access |
| joedemojr456 | SUSPENDED | YES |
| Phone number(s) | Email address(es) | |
| 555-555-5555 | joedemojr@yalevision.com | |

Important! If you've turned on Chase Dual ControlSM, please be sure you have at least one other user who can review and approve those transactions.

[Learn more about statements >](#)

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Access level

Copy access level from another user ▾

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| | |
|--------------------|-----------------|
| Checking (...6268) | Assign access > |
| Checking (...7035) | Assign access > |
| Savings (...9917) | Assign access > |
| Savings (...5095) | Assign access > |

8. When you click Assign access, you should choose the access level for each account we need and select **See Activity Only and Allow Access to See Statements & View Check Images**, for all other accounts that Precision Financial LLC does not need please select **No Access**.

- **No access.** Leave the drop-down list alone. Your authorized user won't have access to this account. Every account is automatically at this level until you assign one of the other options.
- **See activity only.** Your authorized user can see account information but can't initiate transactions. In addition to online activity, Precision Financial will need access to see statements, & view check images. We do not need access to approve transactions initiated by other users.