



BNY Investments: Mutual Fund Account Access App

Frequently Asked Questions (FAQ)

Q1: How do I log in after downloading the BNY Investments: Mutual Fund Account Access App from the store?

A:

- **Existing Online Account Access portal users**
 - a. Tap on the app icon on your mobile device
 - b. You should see the login screen
 - c. Enter your existing User ID/Password that you currently use to access the web-based version of the application
- **New Online Account Access users – set up your login credentials**
 - a. Tap on the app icon on your mobile device
 - b. You should see the login screen
 - c. Below the User ID/Password input box there is a **Get Online Access** link
 - d. Tap on the link and complete the self-registration steps

When the self-registration process is completed, you will be redirected to the mobile app.

Q2: I forgot my password. Can I reset it using the mobile app?

A:

- Follow the steps outlined below:
 - a. There is a link on the login screen which says **“Forgot Password”**
 - b. Tap the [Forgot Password](#) link and follow the steps.

After creating a new password, you will need to tap the app icon on your mobile device and login using your User ID and newly created password.

Q3: I forgot my User ID. Can I reset it using the mobile app?

A:

- Follow the steps outlined below:

- a. There is a link on the login screen “**Forgot User ID**”
- b. Tap the [Forgot User ID](#) link and follow the steps.

After retrieving the User ID via email, you will need to click the app icon and login using the retrieved User ID.

Q4: What versions of the IOS and Android will be supported?

A:

The application can be installed on Android version 8, iOS version 13 and above. Any device with an OS below these specifications will not see the application when searching in the stores (Google Play Store and Apple App Store automatically hide apps that do not support the user’s device).

Q5: Can I take a screenshot of my app (screen recording)?

A:

Yes, you can take a screenshot of your app’s screen on both iOS and Android devices

Q6: What happens when I am in airplane mode?

A:

If your app is open and airplane mode is enabled, you can still use certain features of the app, but please note that there will be no network connectivity. As a result, you will not be able to download or access account information until you turn off airplane mode and reconnect to a network.

Q7: The app is not loading on my device from the app store. What can I do?

A:

- Ensure your device settings are correct.
- Check to see if there is sufficient storage space available on your device for the app download.
- For questions about iOS products/store/device settings/services
 - Contact Apple customer service at 1 (800) 275-2273 or
 - Select <https://getsupport.apple.com/> for help from Apple team
- For questions about Android products/store/device settings/services
 - Contact Google customer care at 1-855-466-4438 or
 - Click <https://support.google.com/store/> for Google Store help
 - Click <https://support.google.com/googleplay/> for Google Play help
- For issues related to the mobile app login/performance/data etc.

Please call us at (800) 645-6561, Monday through Friday, 9:00AM – 5:00PM ET.

Q8: If you are experiencing slow performance or issues with downloading your statements, etc. after logging into the app, there are a few steps you can try to resolve the issue:

A:

1. Check your internet connection: Make sure that you have a stable and strong internet connection. If you are using a cellular data connection, try switching to a Wi-Fi network to see if that improves the performance.
2. Close and reopen the app: Sometimes, simply closing and reopening the app can help to resolve any temporary issues that may be causing slow performance.
3. Update the app: Make sure that you have the latest version of the app installed on your device. If an update is available, install it and try accessing your statements again.
4. Clear the app cache: Clearing the app cache can help to resolve issues with slow performance or loading data. To do this, go to your device's settings, find the app in the list of installed apps, and select the option to clear the cache.

If none of these steps resolve the issue, please contact our support team at (800) 645-6561, Monday through Friday, 9:00AM – 5:00PM ET for further assistance. We will be happy to investigate the issue and help you to access your statements as quickly and efficiently as possible.

Q9: Do I have to pay any fees to use the Mobile app?

A:

Accessing the Mobile App and Mobile Website is free of charge. But, standard text message and data rates may apply, so it's best to consult your carrier for specific information.

Q10: How will I know about updates to the app?

A:

Notifications about updates to the Mobile App will be made available through the respective App Store or Play Store. To access the latest version, please download the update from there.

Or both Google and Apple offer automatic update options for apps on their platforms.

For Google Play Store on Android devices:

Open the Google Play Store app.

Tap the menu icon (three horizontal lines) in the upper-left corner.

Select "Settings," then "Auto-update apps."

Choose either "Over any network" or "Over Wi-Fi only" to enable automatic updates.

For App Store on iOS devices:

Open the Settings app.

Scroll down and tap "iTunes & App Store."

Under the "Automatic Downloads" section, toggle on "App Updates."

By enabling these settings, your apps will automatically update in the background when new versions are available, ensuring that you always have

the latest features and security updates. However, please note that automatic updates may consume data if you're not connected to Wi-Fi, so it's essential to monitor your data usage if you have a limited data plan.