

Santa Barbara Bank & Trust UPDATE - 4/10/2009

END OF SEASON REMINDERS

As we wind down the regular tax season, we want to congratulate you on another successful year! We recommend you take care of a few things related to bank products as we bring the regular season to a close. This will help ensure you are prepared for the off-season. You should:

- Check your past due loan accounts with us (available on our website under the Business Reports section) and provide us any contact numbers or updated information about your past due clients to SBBT.
- Send back any remaining check stock once you are done with them to our mailing address. If you prefer, you can fill in and send us a "Check Reconciliation" form (available under the "Downloadable Forms" link on our website) and then just destroy the check stock yourself.
- Keep the signed RAL applications in your client's files for a period of 5 years (you are not required to send them to us unless we request them from you). Please DO NOT SEND us any unsolicited applications as they will be returned to you.
- Enroll early with your software provider and let them know you want to renew with SBBT.

You may want to set up reminders for yourself so that you can:

- Officially enroll with SBBT this fall through Intuit and our website.
- Opt in for the Client Retention Mailer (CRM) program by Dec 1, 2009.

Effective Thursday April 16, 2009 our live customer support hours of operation will be as follows:

- 7:00 AM to 4:00 PM (Pacific Standard Time) Monday through Friday.

PLEASE NOTE that our automated support line (800) 455-SBBT [7228] and our Client Information Support Center (CISC) at www.sbbtral.com is available 24/7 throughout the year.

Our annual Customer Satisfaction survey is posted at our website. We will also be sending out periodic updates and newsletters on bank related information throughout the off-season. You can get updates by checking our website as well. Thank you for being a business partner with SBBT!

Team SBBT