

How to Set Up Your Customer Wallet

Step-by-Step Instructions to Save Payment Methods



everstory
PARTNERS

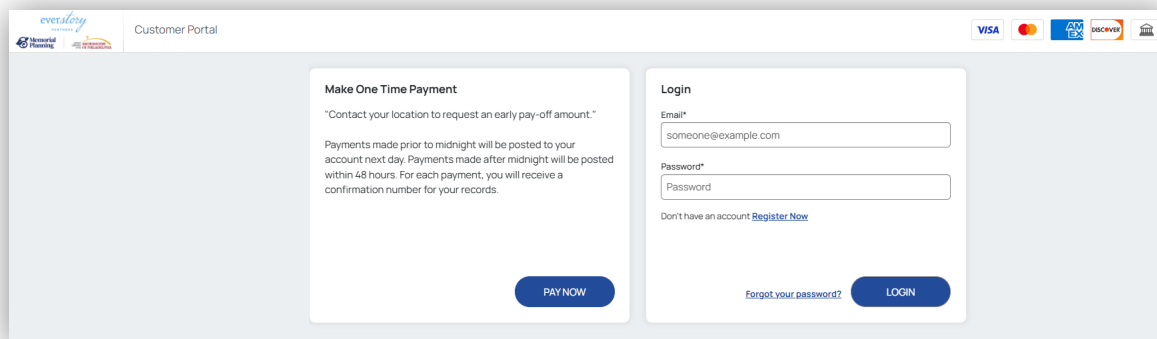


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Access the Customer Payment Platform by visiting MemorialPlanning.com or ArchdioceseofPhiladelphia.org and selecting **My Account**. Log in using the box on the right-hand side.

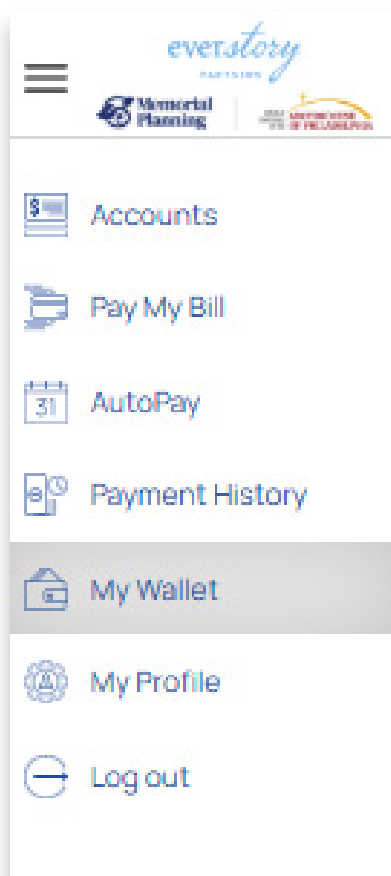
(If you need to set up a new account, please refer to our [Customer Payment Platform Enrollment Guide](#).)



The screenshot shows the 'Customer Portal' login page. At the top left is the 'everstory' logo and 'Customer Portal' text. At the top right are logos for VISA, Mastercard, American Express, Discover, and a bank icon. The main content area has two columns. The left column is titled 'Make One Time Payment' and contains text about requesting an early pay-off amount and payment posting timelines. It has a 'PAY NOW' button at the bottom. The right column is titled 'Login' and has fields for 'Email*' (with 'someone@example.com' entered) and 'Password*'. Below these fields is a 'Forgot your password?' link and a 'REGISTER NOW' button. A 'LOGIN' button is at the bottom right of the login section.

2

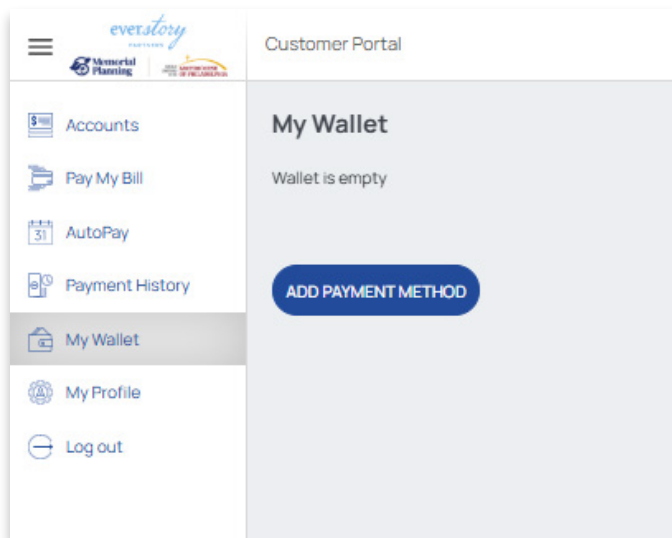
Navigate to the **My Wallet** tab on the right-hand menu.



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Click the **Add Payment Method** button.



4

Add your preferred payment method (eCheck/ACH, Credit, or Debit Card).

Please Note: A 3% surcharge will be added to all credit card transactions (Colorado surcharge is 2%). There is no surcharge for debit card or E-check /ACH payments.

Check the **Set as default** payment method box if desired.

A screenshot of the 'Add Payment Method' form. At the top, there are three tabs: 'E-Check / ACH' (selected), 'Debit', and 'Credit'. Below the tabs is a bank icon and a question: 'Where can I find my routing and account number?'. A blue box highlights a sample routing and account number: '123456789 123456789012345678901234567890'. Below this, labels 'Routing', 'Account', 'Check', and 'OR' are shown. A note states: 'All fields are required unless labeled as optional.' Under 'Account Type', there are radio buttons for 'Checking' (selected) and 'Savings'. Below are input fields for 'Routing Number' (122000247) and 'Account Number' (1234567890). Further down are fields for 'Bank Name' (WELLS FARGO BANK NA) and 'Name on Account' (John Smith). At the bottom left is a checked checkbox for 'Set as default payment method'. At the bottom right are two buttons: 'BACK' and 'ADD'.

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Your payment method is now saved to your Wallet and will be easily accessible for future payments.

To make changes or remove it later, select **Edit** in the right-hand corner.

