

Now you can do all your banking online — whether you're at your desk at work, in your pajamas at home, or sipping coffee at an Internet café. It's easy to put Online Branch to work for you. Simply go to **SummitCreditUnion.com** where you'll see an enrollment option for Online Branch.

### What You'll Find

Manage your accounts easily:

- Check account balances
- View your account history
- Pay your bills
- Receive bills electronically
- Transfer funds between accounts
- Schedule transfers
- Have a check mailed to you
- Verify a check has cleared
- Request a stop payment
- Review loan accounts and history
- Track your money with Money Tracker
- Customize your display
- Access multiple accounts
- Purchase bonds
- Access E-statements
- Change or reset your password
- Set up and receive account alerts
- Connect with Quicken or Money
- Update contact information
- Re-order checks

### Money Tracker

Tracking your money is now easier than ever. Money Tracker is your personal financial management tool that gives you a snapshot of how you're spending your money by categorizing your transactions and balances for you. Money Tracker lets you create reports and budgets so you can get an overall view of where your money is going and allows you to set up account alerts to keep you on track.

### E-Statements

No more waiting for paper statements in the mail! Enjoy safe, secure, instant access to your account statement. And best of all — it's absolutely FREE.

Save time. E-statements allow you to view a secure electronic version of your statement the day it's available. Additionally, e-statements send a notification to your e-mail inbox letting you know your statement is available to view. Simply log in to Online Branch to retrieve your statements.

### Bill Payer

Bill Payer gives you the added convenience of automatically paying bills online and on time.

- Schedule recurring payments including utility bills, mortgage and car payments
- Make one-time payments
- Update payment instructions
- Add or delete payees
- Review your payment history

Bill Payer is free if you pay at least one bill per month. Otherwise there's a \$4 monthly fee. To sign up, simply click on the Bill Payer button in Online Branch.

### Security and Privacy

The safety and security of your account information is of utmost importance to us. We use the latest security measures and technology to ensure your account information remains safe and secure.

### Account Number, Password and Security Image

Each time you log in to Online Branch, you'll be asked for your account number and password. You'll also have a personalized security image. The combination of your account number, password and security image ensure that we recognize you and you recognize us when you log in to your account. We recommend that you change your password frequently, which can be done easily within Online Branch.

### Limited Login Attempts

To prevent unauthorized access to your account, Online Branch will automatically lock your account after three unsuccessful login attempts. You'll need to contact a Member Service Representative to regain access to your account.

### Limited Session Time

Each session of Online Branch is limited to 25 minutes. After 25 minutes, your session will be automatically terminated. This safeguard protects your account information in the event that you get called away from your computer during your session or forget to log off.

### Encryption

This service takes advantage of the powerful encryption technology that prevents monitoring of your account and unauthorized access to your account information.

### Online Help

Contact us with any questions through e-mail or live chat — all just a click away in Online Branch.

**Teller Phone provides you with 24-hour access to your accounts! You'll be guided through our menu. You may speak or use the keypad to complete your request.**

**Access Account Information or Make a Transaction**

- Check your account balances
- Transfer money between accounts
- Check history on your accounts
- Withdraw by check
- Verify a check has cleared

If you want to transfer from Teller Phone to speak to a Member Service Representative during normal business hours, simply say "member service".



**Do more. Start here.**  
SummitCreditUnion.com  
608-243-5000 | 800-236-5560



**Steps to Access Your Account**

To access Teller Phone directly dial 608-245-5698 | 800-236-0985

**Step 1** ..... At menu prompt press 1#

**Step 2** ..... Enter your account number and press #

**Step 3** ..... Enter your PIN  
(Personal Identification Number) and press #

**Step 4** ..... Choose from the following menu options

**To check account balance** .....press 1#

**To review account history** .....press 2#

All transactions .....press 1#

Deposits only .....press 2#

Withdrawals only .....press 3#

Checks cleared .....press 4#

**To transfer funds** .....press 3#

Within the same account .....press 1#

To another account number .....press 2#

**To withdraw funds** .....press 4#

**To review cleared checks** .....press 5#

**To change your PIN** .....press 6#

If you'd like a confirmation number on your transactions, enter \*# at the end of your call.

**Teller Phone Quick Tips**

- You'll need to know:
  - Your account number as it appears on the upper right hand corner of your statement
  - Your PIN (Personal Identification Number)
- This system uses speech recognition to record your responses. Best results are achieved by speaking clearly into the phone receiver. Avoid background noise and the use of cell or speaker phones. When entering numbers, you have the option to speak or use the keypad on your phone.
- Occasionally the Teller Phone lines are busy. Please try back in a few minutes.
- In Teller Phone, you can say or select your option at any time. You do not need to wait for the voice to finish before entering your selection.
- To move quickly through each prompt, press the pound (#) key after each number entered.
- To return to the previous menu, say "previous menu."
- If you want to transfer from Teller Phone to speak to a Summit representative during normal business hours, simply say "member service".

**Contact Us with Questions**

Our Contact Center is available to answer any questions about Teller Phone at 608-243-5000 | 800-236-5560.

7:30 am - 6 pm Monday –Thursday  
7:30 am - 6:30 pm Friday  
8 am - 1 pm Saturday