

INTRODUCING OUR NEW STREAMLINED

Phone Teller

— 805.543.5624 —

or (888) 4-SESLOC (473-7562)
from outside SLO County

This is a general guide to our *Phone Teller* system.

Not every option is listed, and selections will vary according your specific accounts.

The first time you call the new system, you will set up a new 4 to 10 digit PIN.

- Call from a phone number we have on file. This may be your work, home or cell phone.
- Sign-in with your account number and Social Security Number of the primary account holder.
- Select a new 4 to 10 digit PIN.

Press 1 for Account Balances

- **Checking and Savings**
- **Certificates and IRAs**
- **Loans and Credit Cards**
 - 1 – Hear your balance again
 - 2 – Balance for a different share
 - 3 – Account history
 - 1 – Continue with the same account
 - 2 – Select a different account

HELPFUL TIP: At any time during your inquiry
Press * to back up one level in the current menu.
Press 3* to return to the main menu.



PHONE TELLER GUIDE - CONTINUED

Press 2 for Account History

- **Checking**

- 1 – Last five transactions

- 2 – Last five deposits

To move through the list:

- 1 – Next item
 - 2 – Previous item

- 3 – First item
 - 4 – Last item

- **Savings**

- 1 – Last five transactions

- 2 – Last five deposits

- 3 – Last five withdrawals

- **Certificates and IRAs**

- **Loans and Credit Cards**

Press 3 to Transfer Funds or Make a Payment

- **Transfer Funds Immediately**

- **Make payments**

- **Schedule a funds transfer**

- A confirmation number is provided.

- **Hear existing scheduled transfers**

- For transfers scheduled in *Phone Teller* only.

- **Delete an existing scheduled transfer**

Press 4 to Change Your Access Code

Press 5 for Credit Union Information

- 1 – Arroyo Grande Branch

- 2 – Atascadero Branch

- 3 – Paso Robles Branch

- 4 – San Luis Obispo Branch

- 5 – Santa Maria Branch

HELPFUL TIP: Phone Center Representatives

are available during normal business hours.

Press zero during your call to be transferred.

If you experience difficulty during your login you will be automatically be transferred.