New and improved **Phone Teller**

We have implemented a **NEW** phone banking system to better serve you.

**Your First Login**

All members, including those registered for the prior phone banking system, must enroll in the new system by pressing the star [*] key.

**To Register**

Press the star [*] key to begin. The system voice will prompt you to:

1. Key in your user ID (member number only).
2. Key in your PIN code.
3. Enter a new 4 to 12 digit PIN code.
4. Select or record a personal message.
5. Select three challenge questions which can be answered numerically. The system offers 10 options.

**TIP:** Press the pound [#] key to pause for up to two minutes. Press the pound [#] key again to continue.

**Phone Teller** is easy and convenient. Enroll today.

(805) 543-5624
The Phone Teller Menu

Registered Users: Bypass the introductory message by selecting option 1, 2, or 5

1 - Balances or Transaction History
1 - Savings Balance
   1 - For recent transactions
   # - For specific transactions:
       1 - Deposits  2 - Withdrawals
       3 - Checks   4 - Search by amount

2 - Checking Balance
   1 - For recent transactions
   # - For specific transactions:
       1 - Deposits  2 - Withdrawals
       3 - Checks   4 - Search by amount

3 - CD balance + maturity date

4 - Loan balance + next due date

5 - Credit card balance + next due date

2 - Transfers or Loan Payments
   • Select the “Transfer From” account
   • Select a “Transfer To” option
   • Select “Transfer Now” or set a future date

5 - More Options
1 - Locations (User ID and PIN not required)
   1 - Branch locations  2 - ATM locations

5 - Tax Information

6 - More Options
1 - To change security preferences
5 - For check withdrawals

Phone Center Representatives
Phone Center Representatives are available to assist you during normal business hours. If you experience difficulty during your login you will automatically be transferred. If you need to speak with a Phone Center Representative at any time during your call, simply press [#] to be transferred.

Federally insured by NCUA, a U.S. Government Agency.