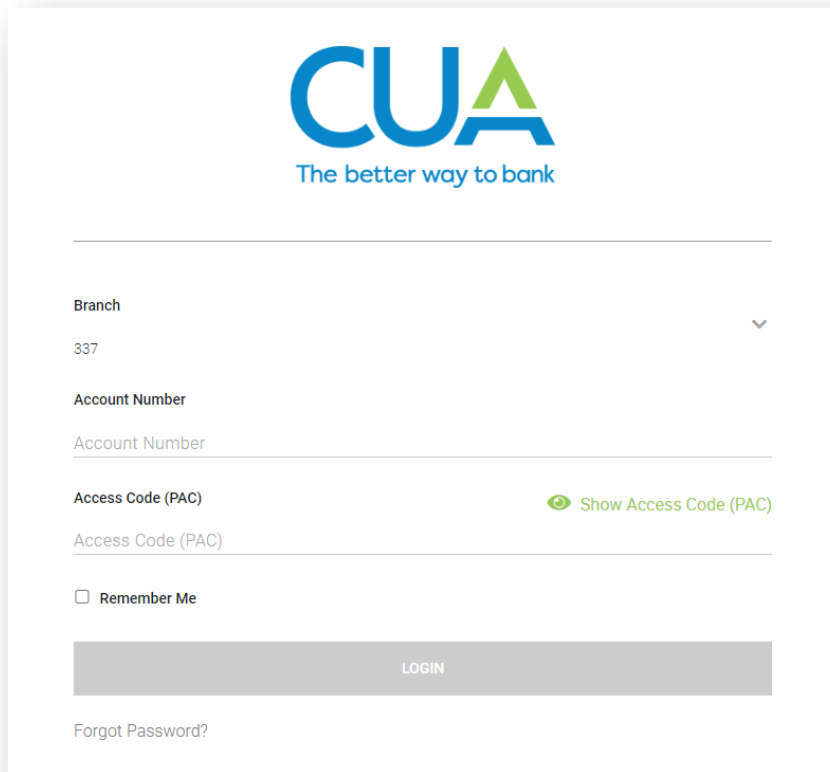


MEMBER WALKTHROUGH GUIDE

GUIDE 1: REVIEW AND UPDATE CONTACT INFORMATION

1. Login to your Online Banking at <https://cua.com/Home/OnlineBanking/>.



The image shows a screenshot of the CUA Online Banking login page. At the top, the CUA logo is displayed in blue and green, with the tagline "The better way to bank" below it. The form contains the following fields and elements:

- Branch:** A dropdown menu with the value "337" and a downward arrow.
- Account Number:** A text input field with the placeholder text "Account Number".
- Access Code (PAC):** A text input field with the placeholder text "Access Code (PAC)". To the right of the field is a green eye icon and the text "Show Access Code (PAC)".
- Remember Me:** A checkbox followed by the text "Remember Me".
- LOGIN:** A wide, grey button with the text "LOGIN" centered on it.
- Forgot Password?:** A link located below the login button.

2. Once you've logged in, you will be brought to the 'Account Summary' page. From here, navigate to the 'Profile and Preferences' page found at the bottom of the lefthand menu.

Personal Banking > Online Banking > My Accounts

▼ My Accounts
View Account Activity
Rename Accounts
View e-Statements
View e-Documents

▶ Payments
▶ Transfers
▶ Business Services
▶ Account Services
▶ Messages and Alerts
▶ Profile and Preferences

Last logged in on Tue, Jun 4, 2024, 1:47 PM, ADT via [Print This Page](#) [Online Banking Help](#)
Online Banking.

Account Summary

Account: 99922001

Account Name	Balance
INTERNAL ACCOUNTS_00010	\$0.00

From Account	To Payee	Date	Amount
You currently do not have any Bill Payments Scheduled.			

From Account	To Account	Date	Amount
You currently do not have any Transfers Scheduled.			

Payee	Cheque #	Account	Date	Amount
You currently do not have any Stop Cheques Scheduled.				

For assistance, please call 1.888.CREDIT-U (273.3488) or email [Sonoma Online Technical Support](#)

3. Within the 'Profile and Settings' page, under 'Preferences' select 'Change Contact Information'.

Personal Banking > Online Banking > Profile and Preferences

[Print This Page](#) [Online Banking Help](#)

- > My Accounts
- > Payments
- > Transfers
- > Business Services
- > Account Services
- > Messages and Alerts
- ▼ Profile and Preferences

Profile and Settings

Member: CUA MDI TEST 2 ACCOUNT
Branch: 337
Account: 99922001

Preferences

- [Change Contact Information](#) Update your address, phone number and other personal details.
- [Change Personal Access Code](#) Edit your secure Personal Access Code here.
- [Change 2-Step Verification Information](#) Change your phone number and/or email address used for 2-Step Verification

4. Once you've selected the 'Change Contact Information' option, navigate to the 'New Contact Information' section, and **a)** select the box next to 'Phone Number / Email'.

Now you can **b)** update your home, cell and work phone numbers, email address, and occupation, as necessary. You will also be required to **c)** select a date for the change to take effect. For this update to take place as soon as possible, please select the current day on the calendar tool.

Please ensure you **d)** select the checkbox consenting to our Privacy Agreement and complete all required fields before **e)** selecting the 'Next' button at the bottom of the page.

Note: While you are updating / confirming your phone number and email for the purpose of logging in to the new online and mobile banking system, you can make any other changes to your information at this time.

The screenshot shows a web form titled "Change Contact Information" with a breadcrumb trail: "Personal Banking > Online Banking > Profile and Preferences > Change Contact Information". On the left is a navigation menu with "Profile and Preferences" expanded. The main content area has a two-step progress indicator: "1. Change Contact Information" (active) and "2. Confirm & Submit".

Current Information (All fields required unless indicated):

Street Address	350-7105 CHEBUCTO RD
City	HALIFAX
Province	NS
Postal Code	B3L4W8
Home Phone	(902) 492-6515
Mobile Phone Number	
Work Phone	
Email	mditest@cua.com

New Contact Information

What would you like to change?

Address

a) Phone Number / Email

Home phone: (902) 492-6515

Work phone: [empty]

Cell phone: (902) 492-6515

Email Address: mditest@cua.com

Occupation: CUA Employee

Federal legislation (FINTRAC) requires Credit Union Atlantic to record an owner's specific occupation. Please complete the Occupation field so that we may process your contact information change immediately.

c) When will this change take effect? 11/06/2024

d) Privacy Agreement: I consent to CUA collecting, using and disclosing my personal information as described in the agreement below. Full Agreement

e) Next

5. You will now be given the chance to review your new contact information. Once you've confirmed the information is correct, select the 'Submit' button at the bottom of the screen.

Personal Banking > Online Banking > Profile and Preferences > Change Contact Information

> My Accounts [Print This Page](#) [Online Banking Help](#)

> Payments

> Transfers

> Business Services

> Account Services

> Messages and Alerts

▼ Profile and Preferences

- Change Contact Information
- Change Personal Access Code
- Change 2-Step Verification Information

Change Contact Information

1. Change Contact Information 2. Confirm & Submit

Change Contact Information

[Print page](#) [Edit](#)

New Contact Information	
Home phone:	(902) 492-6515
Cell phone:	(902) 492-6515
Work phone:	
Email Address:	mditest@cua.com
Occupation:	CUA Employee
When will this change take effect?:	11/06/2024

[Submit](#)

6. You're all done! You can now print a copy of your changes for your records, continue with other online banking activities or logout of your account.

Note: Your changes will be made within two to four business days. In some situations, a member of our team may reach out to verify the changes.

Personal Banking > Online Banking > Profile and Preferences > Change Contact Information

[Print This Page](#) [Online Banking Help](#)

- > My Accounts
- > Payments
- > Transfers
- > Business Services
- > Account Services
- > Messages and Alerts
- ▼ Profile and Preferences
 - Change Contact Information
 - Change Personal Access Code
 - Change 2-Step Verification Information

Change Contact Information

[Print page](#)

Thank you for submitting your new contact information. We will update your details within 2 to 4 business days, and may contact you to verify the changes.

[Print Changes](#)

i You're still logged in! Don't forget to logout when you're done.