



What's New in Online Banking

New! All accounts at PFCU on which you are a signer will appear when you log in. Now you can easily view and transact on all of your accounts at once, make transfers, and more. You can also nickname each account so that it's easy to tell them apart.

Accounts Tab (History)

You'll search for your account history in the **Accounts Tab** and can search by all transactions, deposits, withdrawals, or cleared checks.

-New! Now you can make notes right onto your account history to help you remember what a transaction was for. Great for budgeting and tax organizing.

-New! Enhanced communication tools within Online Banking if you have questions about your accounts or specific transactions.

-New! At the top of your history, note the "Switch Accounts" option. Now you can quickly look at one of your other PFCU accounts from the history. Great for quickly locating a transaction when you can't remember which account you used.

-Print quickly and easily right from the history.

-Quickly identify spending patterns as the logos of merchants you do business with will now be visible in your account history. We have most of the national merchants already, but if you would like us to add your favorite merchants, let us know! You can click on the logo in your history to bring up all of your transactions with them.

New! You can now create an Asset Summary in Online Banking, determine your net worth and build a portfolio.

Transfers

Choose to transfer immediately, or schedule a one-time or recurring transfer to any account at PFCU, whether you are a signer on the receiving account or not (**New!**).

Check Services

Order new checks securely

Withdraw a Cashier's Check to be mailed to you

New! Place a Stop Payment on a single check or a range 24/7. No more forms to fill out! The fee is debited from your account immediately.

Documents

View your eStatements, Opt-Out of eStatements (receive a paper statement in the mail), make notes on your account (great for tax time), review our terms of service any time.

Alerts

New! Choose from a list of helpful alerts to be sent by text or e-mail like before, but now you can choose whether to receive them in real time as they happen, or whether to receive daily, weekly or monthly alert summaries.

New! Reports

Our Online Banking comes with powerful new budgeting tools. Take the time to really explore the Reports Tab and see all the ways you can organize your budget.

- Understand your spending patterns,
- Set goals (the system can suggest amounts based on three months of activity or you can choose your own.) The system will automatically place transactions into categories, but you can edit them to move them around according to your preferences. You can even download reports to Excel!
- Create graphs to chart your spending, saving, assets and liabilities for a quick visual reference
- Sort transactions by categories related to your budget
- Download data to a .csv Excel file
- Easily print from your current display
- Track your net worth (the more data you input, the more accurate it will be)
- Track cash flow from month to month to help you plan

Messages

Send secure messages to and from PFCU in one easy location, either all together, or separated out by incoming and outgoing messages.

Profile

Here is where you can:

- Securely view your:
 - E-mail address
 - Password
 - Phone number
 - Multi-factor Authentication questions and image
- Arrange your Dashboard so that you see the widgets that are helpful to you and hide the ones that aren't.

We hope you enjoy all the new features of our Online Banking and the powerful money management tools it gives you. Please give us a call if you have any questions at (626) 799-0882.



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