

Member Checklist – Save these details

Prepare for your new digital banking experience

Save these details before your new digital banking experience arrives. Your Interac e-Transfer® contacts, bill payees and scheduled or recurring payments and transfers will come across automatically. You don't need to note those down. Everything in the list below, you do.

Some information from your current digital banking will not move to the new system. You'll need to set it up again yourself. You'll also need your member number and personal access code to access the new digital banking experience. If you can't find this information, call us at **1.888.741.1010** or drop by any branch and we'd be happy to help.

We strongly encourage you to review the list below and write these details down, take a screenshot, or print this page before you continue. What applies depends on the kind of membership you have.

	Personal Membership	Business Membership
Alerts Note which alerts you use, and any amounts or limits you've set.	☐	☐
Connected apps Make a note of any budgeting or accounting apps connected to your accounts.	☐	☐
People who have access to your business banking Write down who has access and what they're allowed to do.	—	☐
Memberships consolidated under one login If you sign for more than one membership, write down which ones you currently have combined.	—	☐
Accounting software Note any software connected to your accounts — QuickBooks and similar.	—	☐

Once the new digital banking experience arrives, you won't be able to return to your current digital banking to save the above information.

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