

PLEASE TAKE A COPY

IMPORTANT MEMBER  
INFORMATION REGARDING OUR  
BANKING SYSTEM UPGRADE

Nelson & District  
CREDIT UNION  Logically. Locally.



March 2011

IMPORTANT MEMBER INFORMATION – NEW SWITCH DATE

Members expect innovative products and efficient service. Our current banking system is over a decade old, and to keep pace with changing technology and an evolving financial industry, we're upgrading our banking system—it's time for NDCU to **SWITCH**.

**SWITCH** is an important and significant banking system upgrade. **All NDCU members will be impacted.** Members will receive time-sensitive information leading up to **SWITCH**, so please read all communications to ensure a smooth transition.

Thank you,

Nelson & District Credit Union  
**SWITCH** Team

CONTACT US WITH YOUR QUESTIONS

w. nelsoncu.com/switch  
e. [switch@nelsoncu.com](mailto:switch@nelsoncu.com)  
t. Nelson: 1.877.352.7207  
Rossland: 250.362.7393  
East Shore: 250.227.9221

BRANCH CLOSURES & MEMBER PREPAREDNESS

The re-scheduled **SWITCH** weekend  
will take place from:  
*Friday, April 29 at 5 p.m. to  
Wednesday, May 4 at 10 a.m., 2011.*

During **SWITCH**, all branches will be **closed**.  
Members should expect service interruptions,  
including all MemberDirect internet, telephone and  
mobile services and POS and ATM services.

✓ *Review your checklist on the back page.*

We are expecting all ATM and debit services to be accessible, but there is the possibility these services could be interrupted intermittently during **SWITCH**. We recommend you make alternative arrangements to make payments or access your funds in case these services are not available during the **SWITCH** weekend.

WHAT'S CHANGING AFTER SWITCH WEEKEND?

1. **Portfolio Number:** Your new Member/Account Number will become your "portfolio number."
2. **Member Statements:** Your May statement will have a new look, coming June 2011.
3. **Personal Access Code (PAC):** MemberDirect users will login with a temporary PAC.
4. **MemberDirect Internet Banking:** Your login info will change, details were sent February.
5. **Bill Payments:** Joint/shared account bill payment details may not transfer over. Please retain your monthly bill payment information in order that we can help you get set back up.

## WHAT STAYS THE SAME AFTER **SWITCH** WEEKEND?

1. **Exceptional Products and Member Service**
2. **Direct Deposits**
3. **MemberCard & MasterCard**
4. **Cheques**
5. **Pre-authorized Payments**

## PREPARE YOURSELF FOR THE **SWITCH** WEEKEND

- ✓ **Note the new SWITCH weekend date on your calendar**  
All branches will be closed and electronic services will be interrupted from 5 p.m. Friday, April 29 to 10 a.m. Wednesday, May 4, 2011.
- ✓ **Watch for and read SWITCH communications**  
The most up-to-date information and frequently asked questions (FAQs) can be found at [www.nelsoncu.com/switch](http://www.nelsoncu.com/switch)
- ✓ **MemberDirect internet and telephone banking users will need to update their Personal Access Code (PAC)**  
Members being impacted will have received PAC in the mail early February. If you need a reminder, call our **SWITCH** weekend toll-free helpline, **1.877.352.7207**.
- ✓ **Direct deposit and pre-authorized payment delay**  
Automated deposits and withdrawals will be delayed over the **SWITCH** weekend.
- ✓ **Plan ahead for special purchases and consider alternative payment methods**  
Withdraw some extra cash, plan for large purchases, coordinate traveller's cheques and US funds, consider using cheques or credit cards, and *expect interruptions with ATM and debit card transactions.*
- ✓ **Make bill payments in advance of SWITCH**  
Branches will be closed. MemberDirect internet, telephone and mobile banking services will experience interruptions. Make any payments pre-**SWITCH** weekend.
- ✓ **Nickname multiple accounts**  
Account descriptions will change. "Special Savings 01" might become "Special Savings 201." Giving it a nickname might make it easier to identify: "Special Savings 01" could be nicknamed "Travel Savings."
- ✓ **Retain pre-SWITCH member bank statements**  
We are confident about the integrity of our data and the testing we are doing. Members can do their part by retaining pre-**SWITCH** statements; this allows members to quickly identify and report any inconsistencies to the Credit Union.
- ✓ **Register for eStatements**  
Post-**SWITCH** historical transaction data will not be readily accessible. Sign up for eStatements to access your archived statements. Visit your local branch or [www.nelsoncu.com/estatemnts](http://www.nelsoncu.com/estatemnts) for more information.
- ✓ **Record all bill payment information**  
We expect all bill payment information to transfer over, but we ask that all members record their bill payment details pre-**SWITCH** (vendors, account numbers).