

Dear Valued Member,

We're looking forward to completing our full transition to Broadview, so you can make the most of every benefit.

To prepare, please read the enclosed guide.

**KEEP BANKING AS USUAL** now and after the transition in late spring/early summer.

- ✓ Visit any branch from Albany to Buffalo
- ✓ Pre-existing direct deposits and debits will continue
- ✓ Use your CAP COM Visa<sup>®</sup> Debit and Credit cards
- ✓ Keep using your CAP COM checks
- ✓ Pre-existing transfers you scheduled between accounts will continue

**YOU CAN** smooth the way with nicknames.

- ✓ Nickname all your individual, child, and other joint accounts. See instructions on the back of this letter.

Please keep the enclosed *Broadview Guide* on hand for reference. The latest information can be found at [broadviewfcu.com/capcom](http://broadviewfcu.com/capcom) and for assistance, you can reach us at 800-634-2340.

Sincerely,

Member Support Team

*This is intended for every CAP COM member in your household.*



**Get ready**

See the back for two things you can do now.

Building on our  
experience to  
serve you better



**Information & Updates**

Visit the  
**Member Resource Center**  
[broadviewfcu.com/capcom](http://broadviewfcu.com/capcom)



**Questions? Let's talk**

Visit any branch or call us  
at 800-634-2340

# Get ready

## TWO THINGS YOU CAN DO

1

### Update your contact information

Please confirm your contact information so you receive communications.

- **In online banking**, log in and select Data Check (in top blue bar) or “My Settings” (at top of screen)
- **In the mobile app**, it’s under “More”
- **For assistance**, call us at 800-634-2340 or visit any branch

2

### Nickname your accounts

In the future, all your accounts in Broadview digital banking will be visible under your username. This includes accounts with a spouse, child, or another person listed as joint on the account. Any person designated as joint will also have their own username and will be able to see associated accounts. To nickname your accounts, log in to online banking from a browser (sorry, this functionality is not available in the mobile app) and:

1. Click **Settings** above your list of accounts
2. Nickname each account in the **field at the right** – and you’re all set!

### No nicknames

Your Broadview accounts in digital banking could look like this – if you don’t set nicknames.

Primary Savings	1234567890
Primary Savings	1112223334
Primary Savings	5656565656
Free Checking	9876987654
Free Checking	0101202303

**Some members have dozens of accounts** on which they’re listed as primary or joint.

### With nicknames

You can identify your Broadview accounts in digital banking easily – if you nickname them.

Sylvia’s Savings	1234567890
John’s Savings	1112223334
Mandy’s Savings	5656565656
Sylvia’s Checking	9876987654
John’s Checking	0101202303

**Nicknames make it easy** to see whose account it is, the purpose of an account, or a combination.

*Examples of account numbers and nicknames are provided for illustration only.*

**(|B|) Broadview<sup>SM</sup>**  
Federal Credit Union

Building on our experience  
to serve you better





# Get ready to bank with Broadview Federal Credit Union

Thank you for making time to read this guide, while our teams work diligently to complete the full transition to Broadview.

As members ourselves, we know change can be hard. We're focused on making the experience as smooth as possible for you.

Soon, you can access all the benefits of your Broadview membership with some new perks, including every banking privilege offered at full-service branches across New York.

Your financial well-being is central to everything we do – and the best is yet to come! We'll be here to guide you along the way.

You can expect to receive more information later this month and also find resources at [broadviewfcu.com/capcom](https://broadviewfcu.com/capcom).

## CONTINUE BANKING AS USUAL

**Mid-April**

**Overview**

**Early May**

**Guide & Checklist**

**Mid-May**

Coming Soon  
**Readiness Details**



# Important information to review

## Bank with Broadview

### ✓ STAYING THE SAME

#### Keep banking as usual after the transition

- ✓ CAP COM Visa® cards (debit, credit) will keep working
- ✓ CAP COM paper checks can be used for your payments
- ✓ Automatic debits and credits (ACH) will post to your account, as always
- ✓ Scheduled internal transfers to your accounts will continue as scheduled
- ✓ Scheduled external transfers to accounts elsewhere will continue as scheduled
- ✓ Direct deposits, i.e. paychecks, Social Security (ACH) will continue as scheduled
- ✓ Bill Pay payee and payment details will carry over
- ✓ Nearly all financial products will remain the same

### + ADDED BENEFITS

#### You might like

- + Full banking privileges at all full-service Broadview branches
- + See all primary and joint accounts on one dashboard in your new Broadview online banking and app
- + Live events and online learning through our Financial Well-Being services
- + Free credit score in your new Broadview online banking and mobile app
- + 24/7 live chat on the Broadview website and in Broadview digital banking

## Here are some things to keep in mind

- **Your member number and account numbers** will change and new ones will be provided soon. All your accounts will remain the same, just with different numbers, and carry over automatically.
- **Your new website will be [broadviewfcu.com](https://broadviewfcu.com).** This is where you can log in to online banking in the future. Browse the website and you'll see that it contains many familiar resources and features.



## To ease the transition, complete two simple tasks by May 30

1

### Confirm your contact information.

To make sure you receive future communications, call us or visit a branch to confirm your mailing and email addresses, and mobile phone number. Or, you can do it in digital banking. Not sure how? Head to the FAQs.

2

### Nickname your accounts today.

This is important because when banking systems are integrated as Broadview, primary account holders will be able to see individual and joint accounts under one login in digital banking. Please log in to your account from a browser today and nickname your accounts, so you can identify each one more easily.

# Frequently asked questions

The [broadviewfcu.com/capcom](https://broadviewfcu.com/capcom) webpage centralizes helpful information for you.

## Q. How can I confirm you have my current address and email on file?

A. If you use online banking, log in and select **Data Check** if you see it in the top blue bar. If you don't see the Data Check option:

- In **online banking**, log in and select "My Settings" at top of the screen
- In the **mobile app**, it's under "More"
- **Need assistance?** Call us at 800-634-2340 or visit any branch

## Q. Why do I need to "nickname" my accounts?

A. In the future, all your accounts in Broadview digital banking will be visible under your username. This includes accounts with a spouse, child, or another person listed as joint on the account. To distinguish each one, it will be helpful to nickname your accounts. You can also hide accounts you don't want to see.

Any person designated as joint will also have their own username and see associated accounts. If you want to remove a joint account holder, that person must make the request. For guidance, please contact us.

## Q. Will everyone listed as primary and joint on accounts be able to see activity in digital banking and on statements?

A. Yes. Each will have a username and be able to view their primary and joint accounts. Broadview statements will be provided for those listed as primary, as they are today.

## Q. Will digital banking look the same?

A. Digital banking will have a clean new look plus some extra features such as free credit score.

## Q. What will happen if I already have an account at Broadview?

A. You will keep it. Your CAP COM account(s) will be moved under your existing Broadview relationship.

## Q. Will payments I set up to pay from my CAP COM Debit or Credit cards still work?

A. Yes. Payments you set to charge your Debit or Credit cards will continue being paid, so no action is needed.

## Q. What about my monthly statements?

A. You will receive statements on the same schedule as you do today.

## Q. What if I need to see previous transactions?

A. You can access 18 months of transaction history in digital banking and if you need more, contact us.

## Q. Will the financial products be changing?

A. You'll have access to nearly all the same products. The names of a few will change. For example, the main checking account, Consumers Choice Checking, will become Free Checking. Name changes will be outlined in future communications and online at [broadviewfcu.com/capcom](https://broadviewfcu.com/capcom).

## Q. Will my mortgage with SEFCU Mortgage Services or Homeowners Advantage change?

A. No, nothing is changing.



# We're here to support you

## Thank you for staying informed.

Another mailing in May will provide additional details. For the most up-to-date information, scan this code or visit the Member Resource Center at [broadviewfcu.com/capcom](https://broadviewfcu.com/capcom).



## Reminder: Fraud Safety Tips

**Our team may call or email you** to confirm your contact information, so you receive important communications.

**Our team will NOT contact you and ask** for your account number, access codes, usernames, or passwords. Beware, don't share!

**When in doubt, reach out.** If you're uncertain about a message or conversation, please contact our team at 800-634-2340.

## Ways to contact us

Please reach out to us if you need assistance.



**Go To**

[broadviewfcu.com/capcom](https://broadviewfcu.com/capcom)



**Call**

800-634-2340



**Chat 24/7**

[broadviewfcu.com](https://broadviewfcu.com)



**Visit**

Any branch