AccountPlus™ — A New View to Managing Your Money

AccountPlus™ - *A New View to Managing Your Money!*

Cornerstone Credit Union is pleased to introduce the *AccountPlus™* consolidated view, a new *MemberDirect®* feature that provides a consolidated online view of your accounts.

With the *AccountPlus™* feature, you can check the account details and transaction history online for your chequing and savings accounts, loans and investment funds. In addition to your credit union accounts, the *AccountPlus™* view could include other credit union financial partners accounts such as registered and non-registered investments. The current partners include the Credential group of companies: The Ethical Funds Company™, Credential Asset Management Inc. and Credential Securities Inc.

The *AccountPlus™* feature brings you one step closer to complete financial management. This new feature enhances the *MemberDirect®* online service capability with the added convenience of a consolidated account view.

Getting started with your *AccountPlus™* view is easy. All you need is online access to your *MemberDirect®* account and current statements for each partner account you would like to link.

Once you have logged onto your *MemberDirect®* account and selected the My Profile tab, the Manage *AccountPlus™* screen will be displayed. You will be able to link each account in a matter of minutes. To ensure your privacy and security each account has to be linked separately within the Manage *AccountPlus™* feature. It's that easy! Now you're ready to take advantage of the many benefits the *AccountPlus™* consolidated view has to offer.

Linking a Credential Partner Account to MemberDirect®

Pre-requisite:

- We recommend you refer to a recent statement for each partner account you wish to link.

Step 1 – Login to *MemberDirect®*:

- Select 'Manage AccountPlus' from the vertical menu on the left sidebar, or
- Select 'My Profile' & 'Manage AccountPlus™' from the horizontal menu on the top of the *MemberDirect®* display.

Step 2 – Manage AccountPlus:

- Select the link associated with the Credential partner name (as displayed on your statement). You will then be taken to a 'Link Investment Account' screen.

Step 3 – Link Investment Account:

- You are then prompted to enter your client ID or Investor number in the field provided. Each 'Link Investment Account' screen has a linked image of a sample account statement to help guide you.

Step 4 – Account Link Successful:

- Account Link Successful notification should be displayed on screen. Within the next 5 minutes, your Credential partner account, including any investments under that account, will be linked and accessible through the Account Summary screen.