



Account Management by Phone System User Guide

Dial 1-877-TRUMARK, then:

1. Press 1
2. Enter member number
3. Enter primary member's 4 digit Personal Identification Number

CREDIT UNION

Menu options

Press 1 for account balances

- o **Enter Share ID to hear the balance of a particular Share or loan account**
- o **Press # for a list of Shares**

Press 2 for a list of open loans

Press 3 for Visa inquiries/transactions

- o **Press 1** credit card payment inquiry
- o **Press 2** for credit card balance information
- o **Press 3** to make a credit card payment
- o **Press 4** to transfer funds from a Share to a loan
- o **Press 5** for recent credit card transactions

Press 4 for Share history menu

- o **Press 1** for Share history
- o **Press 2** for loan history
- o **Press 3** for checking information
- o **Press 4** to inquiry on a check

Press 5 to process a withdrawal

Press 6 for additional menu options

- o **Press 1** for YTD information
 - i. **Press 1** for contributions and tax information
 - ii. **Press 2** for dividends and interest
- o **Press 2** for certificate information
- o **Press 3** to login with another member number

Press 7 to transfer funds

- o **Press 1** for Share to Share
- o **Press 2** for Share to loan
- o **Press 3** for loan to checking

Press 8 to login with another member number

Helpful hints

- o **Press *** to replay selection
- o **Press 1** to end the call
- o **Press 0** to return to the main menu