



# 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

## 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