

Your Resource Guide To Understanding

# Our Upcoming System Conversion & What It Means For You



On Thursday, June 1, 2017, Jax Metro Credit Union merged with Self-Help Credit Union. Now that we've completed the legal merger, we must integrate all 4,500 members of Jax Metro CU into Self-Help CU's operational database of products and services, which currently supports 65,000 members nationwide. This is what we call a "system conversion."

To help you prepare for the integration, we've assembled this booklet to provide you with preliminary guidance on the changes that will impact you as a member. Additional conversion prep information will be mailed to you as we get closer to the Monday, October 2 completion date of the conversion.

Be aware that this conversion will change where you go to access various account services (websites, online banking, audio banking, etc.) and may require that you take steps to update your specific member identification to access some of those services. Specific information about account access locations and logins will be provided in future mailings in advance of the completion of this conversion. We appreciate your help in making this a smooth transition and we apologize in advance for any inconvenience this conversion may cause.

Lastly, now is a good time to make sure that we have your most current and accurate contact information (mailing address, email address, telephone numbers, etc.). Please notify Jax Metro CU to make any necessary changes. Thank you!

Sincerely,

*Sheree Eddie*

President, Jax Metro Credit Union

## KEY DATES & ACTIONS

### FRIDAY, SEPTEMBER 29 (5 PM) CONVERSION BEGINS

- Access to all Jax Metro CU e-services (online banking, audio banking, Bill Pay, etc.) will be permanently disabled at 5 PM on Friday, September 29.

#### CARD TRANSACTIONS

Jax Metro debit, credit and ATM cards will continue to function throughout system conversion weekend, although sporadic service disruptions may occur. See the CARDS section of this guide for details.

### MONDAY, OCTOBER 2 (8 AM) CONVERSION COMPLETED

- Begin using Self-Help Credit Union e-services upon conversion completion. These will include online banking, audio banking, Bill Pay, e-statements, etc.
- Your newly-issued member number goes into effect upon conversion completion (see the following page for more information).

Expect normal business hours to be in effect for all branches on Friday and Monday.

## CHECKS & AUTOMATIC DEPOSITS/WITHDRAWALS

**No change to checks.** You may continue to use existing Jax Metro CU checks after this system conversion. Additionally, you may continue to re-order checks as you've done in the past. The only difference with new checks will be the appearance of our new logo on the checks.

**No change to automatic deposits or automatic withdrawals.** Upon the conclusion of this system conversion we will continue to support your existing Jax Metro CU account number being used for automatic deposits and/or withdrawals.

## ACCOUNT STATEMENTS

The timing of the conversion is not expected to disrupt the output of your statements.

Recipients of paper statements will continue to receive a mailed paper statement and can expect statements to continue to arrive around the same time of the month, each month, after conversion.

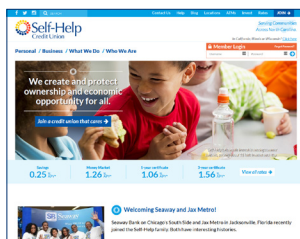
E-statement recipients will need to make a change. The Jax Metro CU online banking site will be permanently disabled at 5 PM on Friday, September 29. However, your Jax Metro CU e-statements will be transferred to Self-Help Credit Union's online banking site and available to you beginning on Monday, October 2. Access the new online banking site from the home page of Self-Help Credit Union's website ([www.self-help.org](http://www.self-help.org)). Information about your specific online banking login credentials will be mailed to you in mid-September.

On or after Monday, October 2, e-statement self-enrollment will be available to any member not currently enrolled to receive Jax Metro CU e-statements. To self-enroll, simply log into Self-Help Credit Union's online banking site, click on the ONLINE SERVICES tab, click on the e-statements link and follow the e-statement self-enrollment instructions.



## ONLINE BANKING SERVICES

Starting on Monday, October 2, the Self-Help Credit Union website is where you must go to access many of our new online banking e-services including e-statements and Bill Pay. **A mid-September mailing will contain your unique username and password information for access to all of Self-Help Credit Union's electronic services after the completion of the conversion.** Contact Jax Metro CU if you have not received that very important mailing before we enter the last week of September.



## OUR NEW LOGO

We've added a few new visual elements to our logo, namely Self-Help's multi-colored community circle and the phrase "A Division of Self-Help CU." We hope you agree that the community circle is a pleasing addition to the look of our new logo.

Over the coming weeks and months we plan to display our newly branded logo wherever our name appears in public, including on branch signs and in our marketing materials.

From this...



To this...



## ABOUT SELF-HELP

Self-Help is a 37 year-old nonprofit financial services and advocacy organization made up of several mission-driven enterprises including two credit unions (**Self-Help Credit Union** and **Self-Help Federal Credit Union**).

Self-Help acts on its mission of creating and protecting ownership and economic opportunity for all by offering fair and affordable financial services to members, helping renters to become homeowners, providing financing to small business entrepreneurs and by advocating for responsible lending policies that help all people, especially families with low-to-moderate incomes.

Visit the *Who We Are* and *What We Do* sections of the Self-Help Credit Union website to learn more about Self-Help. Also, you're encouraged to connect with Self-Help via social media. You'll find Self-Help on Facebook, Twitter, YouTube, Instagram and LinkedIn.

After this system conversion, all Jax Metro members will be served by **Self-Help Credit Union**. It is appropriate, and necessary, for Jax Metro CU members to utilize the products and services of Self-Help Credit Union including the online banking services accessed via the Self-Help Credit Union website.



## CARDS

Jax Metro CU cards will not change with the upcoming system conversion. Active debit, ATM and credit cards will function on the new system just as they do today.

During conversion weekend, however, some disruptions to your card service may occur and certain transactions, such as balance inquiries, may not be available at all times. We apologize for the inconvenience this may cause.

#### DEBIT CARDS

Will remain active before, during and after conversion weekend.

#### ATM CARDS

Will remain active before, during and after conversion weekend.

#### CREDIT CARDS

Will remain active before, during and after conversion weekend.



Contact your local branch of Jax Metro Credit Union with any questions or comments regarding the upcoming system conversion.

Thank you for your membership and trust. We look forward to continuing to serve you!



After conversion, it will be necessary for Jax Metro CU members to utilize the products and services of Self-Help Credit Union including the online banking services accessed via Self-Help Credit Union's website ([www.self-help.org](http://www.self-help.org)). Please do not begin contacting Self-Help Credit Union for member service until after the completion of the system conversion.