



# TrustReporter® Online Account Access

## Set-up Form for Member Credit Unions

Date: \_\_\_\_\_

Institution Name: \_\_\_\_\_

Mailing address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_ ABA/RTN: \_\_\_\_\_

### Credit Union Authorization for Online Account Access:

#### Full Access

#### Inquiry Only

|  |     |     |
|--|-----|-----|
| Change User Profile – the ability to change ones own password and contact information. | Yes | Yes |
| Trust Reports – the ability to view fixed and custom reports.                          | Yes | Yes |
| Account Statements – the ability to view monthly PDF account statements.               | Yes | Yes |
| Sec. Trans. Confirmation – the ability to create, edit and delete trade tickets.       | Yes | No  |

### User Information - Additions/Changes to individuals for with online access:

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Delete:  Add:  Change:  Access Level:  Full  Inquiry only

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Delete:  Add:  Change:  Access Level:  Full  Inquiry only

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Delete:  Add:  Change:  Access Level:  Full  Inquiry only

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Delete:  Add:  Change:  Access Level:  Full  Inquiry only

CU Authorized signature:: \_\_\_\_\_

Name: \_\_\_\_\_ Title: \_\_\_\_\_