TruNeighbor CREDIT UNION

Real People. Real Service. Real Neighbors.

ROUND UP SAVINGS PROGRAM OPT-IN/OPT-OUT

What is the Round Up Savings Program?

- The Round Up Savings Program allows you to save money by rounding each of your debit card transactions to the nearest whole dollar amount. The difference is then transferred from your checking account to a Round Up Club Account.

How does it work?

- Your Round Up Club Account will automatically open when you make your first debit card purchase after enrolling in the program. Each debit card transaction will then be rounded up, and your savings will be transferred to your new club account.
- Your savings will be calculated on a daily basis, meaning multiple debit card transactions in a day will appear as one deposit into your Round Up Club Account. The deposit will be visible on your account the following morning.
- If there are partial funds in your checking account, a partial transfer will be made to your Round Up Club Account. If there are no funds in your checking account, no transfer will be made.

Terms and Conditions:

- Round Up transfers only apply to TruNeighbor Credit Union Debit Card transactions.
- Round Up Savings Program will not utilize any overdraft source, including Courtesy Pay, nor will it take your account into the negative.
- If a debit card purchase is canceled or reversed, the corresponding Round Up Savings Program transfer will remain in your Round Up Club Account.
- ATM transactions are not included in this program.

***I would like to enroll in the Round Up Savings Program.** ☐

***I am currently enrolled in the Round Up Savings Program and would like to Opt-Out.** ☐

Name: ______________________________________ **Account Number(s):** ______________

Signature: ___________________________________ **Date:** _________________