

Member Profile+

A custom version of the Member Profile that can be enhanced with additional options to expand the amount of information available to front-line staff.

- 1 Member Address taken from the person record.
- 2 Displays the member's driver's license or ID.
- 3 Shows the member's contact information listed on any of their accounts. Also shows occupation and mother's maiden name.
- 4 Summarizes any notes or alerts attached to the member's accounts.
- 5 Displays 3 most recent checks deposited into the member's account.
- 6 Calculated eligibility of free checks on account record.
- 7 Checks for an ACH deposit in the last 90 days and displays the average.

Joan Sample
7505 EASTEX FREEWAY
BEAUMONT, TX 77708

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Check Tier: undefined

Notes & Alerts

Bankruptcy - Ch 13

Zelle Level 3 - \$1000 Daily/\$3000 Monthly

RDC Level 2

E-Title

Skip A Pay Ineligible

Length of Membership: 23 years 0 months 19 days

Online Banking: Yes

Free Box Of Checks: No

Account: DUPLUS

E-Statements: No

Eligibility : Jefferson

| Shares | Open Date | Joint Owner(s) | Average Direct Deposit 3 Months | Average Balance 6 Months | Courtesy Pay/Nsr 6 Months | Checking Lookup(MIRC) 6 Months | Available Balance | Current Balance |
|-----------------------------|------------|----------------|------------------------------------|-----------------------------|------------------------------|-----------------------------------|-------------------|-----------------|
| P S 0000 Regular Share Acct | 09/28/1983 | X | \$0.00 | \$1,789.16 | | 313186679 ██████████ | \$1,784.92 | \$1,789.92 |
| P S 0009 Checking Account | 04/28/2015 | X | \$0.00 | \$9,928.04 | | 313186679 ██████████ | \$10,007.48 | \$10,007.48 |
| P S 0015 Checking Account | 03/31/1987 | X | \$1,798.50 | \$29,364.61 | | 313186679 ██████████ | \$36,401.98 | \$36,401.98 |
| P S 0083 30 Month IRA Cert | 10/03/2021 | X | \$0.00 | \$3,861.67 | | | \$3,781.14 | \$3,781.14 |
| P S 0084 24 Month IRA Cert | 04/14/2022 | X | \$0.00 | \$6,414.61 | | | \$6,433.73 | \$6,433.73 |

| Loans | Open Date | Auto Transfer | Due Date | Due Payment Amount | Standard Payment | Current Balance |
|-------------------|------------|---------------|------------|--------------------|------------------|-----------------|
| L 0046 MasterCard | 02/01/2001 | X | 04/24/2022 | \$20.00 | \$20.00 | \$299.54 |

Account: DUPLUS

E-Statements: No

Eligibility : Jefferson

| Shares | Open Date | Joint Owner(s) | Average Direct Deposit 3 Months | Average Balance 6 Months | Courtesy Pay/Nsr 6 Months | Checking Lookup(MIRC) 6 Months | Available Balance | Current Balance |
|------------------------------|------------|----------------|------------------------------------|-----------------------------|------------------------------|-----------------------------------|-------------------|-----------------|
| P S 0000 Regular Share Acct | 07/30/2003 | X | \$0.00 | \$63,672.33 | | 313186679 ██████████ | \$63,694.76 | \$63,699.76 |
| P S 0015 Checking Account | 07/30/2003 | X | \$0.00 | \$189.83 | | 313186679 ██████████ | \$189.83 | \$189.83 |
| P S 0040 6 Month Certificate | 01/04/2022 | X | \$0.00 | \$2,282.80 | | | \$2,284.27 | \$2,284.27 |

| Cards | Card Design | Primary Account | Original Card Issue Date | Card Reprint Date | Replacement Card Fee | Overdraft Coverage | External Account Number | Total Cards (36 Months) |
|------------|-------------|-----------------|--------------------------|-------------------|----------------------|--------------------|-------------------------|-------------------------|
| ██████████ | ██████████ | ██████████ | 2001-02-01 | 2024-02-29 | Free | NA | ██████████ | 1 |

| Opportunities | Date Placed | Status | Description |
|-----------------------|-------------------------|--------|--|
| Opportunity Insertion | 2022-10-31 12:48:13 CDT | Open | Testing Opportunity Entry Via Batch Script |
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- ⑧ Cards and Loans listed in tables separate from share accounts.
 - ⑨ Checks the account for any opportunities that have been generated by running Batch or UI Scripts.