

Shared Accounts

- After logging into your home page, select the **Share My Accounts** option from the **Accounts** content box.

The screenshot shows the MyFinancial home page. The 'Accounts' section is expanded, displaying several tables. The 'Share My Accounts' link is circled in red.

Deposits	Balance	Available
My Savings	\$3,011.10	\$3,011.10
My Checking	\$5,617.67	\$5,617.67
Total:	\$8,628.77	\$8,628.77

Loans	Amount Due	Balance
Truck Loan	\$87.64	\$12,314.02
Line of Credit (C001) Delinquent	\$775.00	\$775.00
Visa Credit Card	\$250.00	\$2,324.55
Total:		\$15,413.57

Shared Accounts	Balance	Available
Shelby's Savings	\$707.78	\$707.78
Joe's Checking	\$3,028.95	\$3,028.95
Mobile (D010)	\$5,128.71	\$5,128.71
Total:	\$8,865.44	\$8,865.44

[Share My Accounts](#)

- Once this option is selected, you will be redirected to **User Preferences / Share My Account** section. You can view and/or edit your current Shared Accounts that you have setup or you can select the **Add New Share** option to create a new shared account.

The screenshot shows the 'Share My Account' section. It features a table with columns for 'Account', 'Expires', and 'Permissions'. The 'Add New Share' link is circled in red.

Account	Expires	Permissions
Share My Checking with member 0000006191		<input checked="" type="checkbox"/> Allow Transfers To <input checked="" type="checkbox"/> Allow View Balance <input checked="" type="checkbox"/> Allow View History <input checked="" type="checkbox"/> Allow Transfers From Unlimited Access
Share My Checking with member 0000006188		<input checked="" type="checkbox"/> Allow Transfers To <input checked="" type="checkbox"/> Allow View Balance <input checked="" type="checkbox"/> Allow View History <input checked="" type="checkbox"/> Allow Transfers From Unlimited Access
Share My Checking with member 0000000007		<input checked="" type="checkbox"/> Allow Transfers To <input type="checkbox"/> Allow View Balance <input type="checkbox"/> Allow View History <input type="checkbox"/> Allow Transfers From
Share My Checking with member 0000006039		<input checked="" type="checkbox"/> Allow Transfers To <input checked="" type="checkbox"/> Allow View Balance <input checked="" type="checkbox"/> Allow View History <input checked="" type="checkbox"/> Allow Transfers From Unlimited Access
Share My Checking with member 0000005819		<input checked="" type="checkbox"/> Allow Transfers To <input checked="" type="checkbox"/> Allow View Balance <input checked="" type="checkbox"/> Allow View History <input checked="" type="checkbox"/> Allow Transfers From Unlimited Access

[Add New Share](#)

- When you create a Shared Account, you will be presented with the following options:

Member: Enter the Member Number of the member that you want to share your account with.

Last Name: Enter the Last Name of the member that you want to share your account with.

Account: Select which Share/Loan account you want to share with another member.

Name: This is how the account name will appear on the other member's home page.

Expires: Select the date you want this Shared Account to expire or, it can be set to never expire.

Permissions: The member will have various permissions they can choose from that will limit the account access.

- Once you create a new Shared Account, the member you shared your account with will see your account on their home screen within the Accounts content box under the Shared Accounts section. Based on the permissions that were granted, the recipient member can now view the balance, review history transactions, transfer to/from or rename the account.

Accounts

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Loans	Amount Due	Balance
Truck Loan	\$87.64	\$12,314.02
Line of Credit (C001) <i>Delinquent</i>	\$775.00	\$775.00
Visa Credit Card	\$250.00	\$2,324.55
Total:	\$1,107.64	\$15,413.57

Cross Accounts	Balance	Available
C BRANSON (*1911) (0010)		
DAVID REED (*1911) (S000)		

Shared Accounts	Balance	Available
David's Savings	\$707.78	\$707.78
Joe's Checking	\$5,128.71	\$5,128.71
Mobile (0010)	\$5,128.71	\$5,128.71
Total:	\$8,865.44	\$8,865.44

[Share My Accounts](#)

Credit Union Announcements

Accessing your account and paying your bills is now easier than ever!

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Learn how to **BANK ONLINE**

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Authorization Holds

Account	Amount	Date	Expiration
My Checking	\$85.00	08/22/2011	12/31/9999