



## BENEFITS ACCESS | PARTNERING WITH UECU

Partnering with UECU provides your employees with exclusive member products and resources. Since its inception in 1934, UECU has embodied the philosophy of “people helping people.” UECU’s profits are returned to members through deposit rates that far exceed the national average, a member rewards and discount program, a customizable employee financial wellness program, low fees, nationwide ATM surcharge protection, and free financial services and consultation.

## PARTNER TESTIMONIAL:

“I am proud to share the Utilities Employees Credit Union information and services with our employees. It is so nice to share valuable financial services with our valued employees.”

-Carol Laumann, Exelon Generation

## ACTIVATING YOUR EMPLOYER BENEFIT

There is no cost to activate UECU’s employee benefits. Contact Paula Simmons, your dedicated UECU representative, to request that your UECU employee benefits are activated.



### CONTACT PAULA SIMMONS

National Account Representative  
Certified Financial Wellness Facilitator

Office: 800.288.6423 Ext. 4013  
Mobile: 484.388.0615  
psimmons@uecu.org



Visit [UECU.org/Paula-Simmons](https://uecu.org/Paula-Simmons)

## EMPLOYER BENEFIT OFFERINGS<sup>1</sup>

- FREE MEMBERSHIP for ALL EMPLOYEES
- DIRECT ACCESS to UECU REPRESENTATIVES
- MEMBER CAR BUYING SERVICE
- CREDIT CONSULTATION
- MORTGAGE CLOSING COST DISCOUNTS
- HOME FINANCING and REFINANCING
- EMPLOYEE FINANCIAL WELLNESS SESSIONS
- CREDIT SCORE REVIEW and EDUCATION
- ATM SURCHARGE PROTECTION
- EMERGENCY ROADSIDE ASSISTANCE
- CELL PHONE PROTECTION
- ID THEFT PROTECTION
- RETAIL, SHOPPING and TRAVEL DISCOUNTS
- VISA® CREDIT and DEBIT CARD REWARDS
- and MORE ...

<sup>1</sup> Terms and conditions apply for select benefits. See credit union for details.



## BENEFITS ACCESS | 6 STEPS TO ACTIVATE YOUR UECU EMPLOYER BENEFITS

### 1 Select Desired Program Option

Review program options on Page 3 and select desired program option.

### 2 Timeline Meeting

Contact Paula Simmons using the information below to schedule brief meeting and confirm timeline.

### 3 Field of Membership Letter (FOM)

Download, review and complete FOM letter. Insert EIN#, verify description (highlighted), add name of contact responsible for signing.

### 4 Sign FOM Letter and Return to UECU

Sign, Scan and deliver FOM letter via email to Paula Simmons at [psimmons@uecu.org](mailto:psimmons@uecu.org) or use contact information listed below if sending by mail.

### 5 Department of Banking Approval

UECU submits Field of Membership letter to Department of Banking for approval (approximately four weeks).

### 6 Approved! Establish Rollout & Timeline

Rollout start date is established. Co-branded welcome literature is distributed by UECU. Co-branded partner landing page is published and LIVE.



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#### Sample Field of Membership Request Letter

(Your Company Letterhead)

(Today's Date)

Bret Krevolin, President/CEO  
Utilities Employees Credit Union  
PO Box 14864  
Reading, PA 19612-4864

Dear Mr. Krevolin:

**Your Company Name (Business Entity Number)** is a provider of **describe the company's primary activities**. **Your Company Name** is headquartered in **city, and state** and employs approximately **# of employees** individuals throughout the state(s) of **list states(s) initials**.

There is presently no credit union service available to **Your Company Name** that serves all the employees. It is, therefore, our desire that all **Your Company Name** employees, retirees, and their families be admitted to the field of membership of Utilities Employees Credit Union.

Please expedite the approval process to begin credit union service for our employees and their families.

Sincerely yours,

(Official Representative's Name)  
(Title)

Download Field of Membership Letter at  
[UECU.org/FOMletter](https://uecu.org/FOMletter)



Your Employee Wellness Partner.

ACCESS THIS CONTENT ONLINE >>



## BENEFITS ACCESS | PLEASE SELECT AN OPTION BELOW

	OPTION A	OPTION B
Both Plan Benefits Include:	Gigawatt Plan+ CueltUp	Megawatt Plan+ CueltUp
<b>Offline Communications</b>		
On-site financial wellness training	Twice Annually (per site)	Annually (per site)
Co-branded launch materials	Designed, printed and distributed by UECU on your behalf	Designed by UECU for you to print and distribute
Financial tips newsletters	Three designed, printed and distributed by UECU on your behalf	Two designed by UECU for you to print and distribute
<b>Online Communications</b>		
Co-branded financial wellness webinar(s)	Quarterly	Annually
Co-branded launch materials	Designed and deployed by UECU on your behalf	Designed by UECU for you to print and distribute
Financial tips newsletters	Three designed, and deployed by UECU on your behalf	Two designed by UECU for you to distribute
<b>Program Resources</b>		
Custom designed co-branded program landing page	✓	✓
Access to UECU personal finance experts	✓	✓
Special landing pages to drive engagement	Quarterly	Twice Annually
Custom Integration with wellness program	✓	✓
Reporting of employee program use for incentives	Quarterly	Twice Annually
Bulk Visa® gift card purchases for employee rewards	\$1.95/card	\$3.95/card



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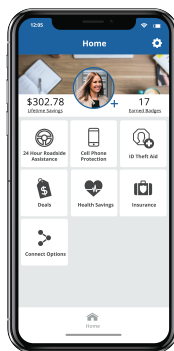


## Employee Resources

### Empower Employees with Checking Powered by BaZing | BaZing

Your employees will love the money-saving benefits and personal protection features<sup>1</sup> we have to offer.

- Local discounts on shopping, dining, and travel
- National retailer discounts
- Cell phone protection
- Identity theft protection
- Roadside assistance and more!



## Activate Your Employer Benefit



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1 Subject to the terms and conditions detailed in the Checking Benefits Reference Guide. 2 Insurance products are: NOT A DEPOSIT. NOT FEDERALLY INSURED. NOT AN OBLIGATION OR GUARANTEED BY THE CREDIT UNION, ITS AFFILIATES, OR ANY GOVERNMENT AGENCY. 3 An active Rewards Checking or Rewards Checking PLUS account with at least one transaction per month may provide a rate reduction of .25% on select loan types. Exclusions apply, not all loan types are eligible for the .25% rate reduction, see credit union for details. 4 Earn 1 point for every \$4 spent on Visa purchases. ATM cash transactions or cash advance transactions are not eligible to earn points. Points are earned net of credits. 5 *Advantages Visa® Debit Card™* holders, who sign up for E-Statements, earn 1 point for every \$2 spent on Visa purchases. You must be enrolled in *Advantages Online™* to sign up for E-Statements. 6 Rewards Checking accounts first set of checks is free and is limited to one style. Rewards Checking PLUS accounts receive a free set of checks per calendar year and is limited to a basic style in a choice of three colors. 7 Participating merchants on BaZing are not sponsors of the program, are subject to change without notice, may not be available in all regions, and may choose to limit deals. 8 ATM surcharge rebate will vary based on checking account type. 9 BaZing benefits are only available for Rewards Checking or Rewards Checking PLUS accounts.

## BaZing Powered Checking Benefits<sup>9</sup>



### Anywhere Banking Tools

Online banking, mobile banking, mobile check deposit, bill pay, debit card and E-Statement.



### Free Checks<sup>6</sup>



### Earn VANTAGEPOINTS™ with Free Visa® Debit Card<sup>4</sup>

Choose E-Statement & Earn Extra Reward Points<sup>5</sup>



### ATM Surcharge Rebates<sup>8</sup>

Nationwide ATM Access and Surcharge Rebates



### Roadside Assistance<sup>1</sup>

Available 24/7 and free to use, up to \$80 in covered service charges.



### Health Savings Discount Card<sup>1</sup>

Save money on prescriptions, eye exams, frames, lenses and hearing services.



### Cell Phone Protection<sup>1,2</sup>

Receive up to \$400 per claim (\$800 per year) if your cell phone is broken or stolen.



### ID Theft Aid<sup>1,2</sup>

Includes payment card fraud resolution, \$2,500 in personal theft benefit and identity restoration.



### \$10,000 Travel Accidental Death Coverage<sup>1,2</sup>

Peace of mind for the unexpected.



### Shop Local, Save Local with BaZing Savings<sup>7</sup>

Local discounts and national retailer deals to save you money on shopping, dining, travel & more.



### Loan Discount<sup>3</sup>

.25% off new term loans.