

# How to Transfer NicAWS Conference Accounts to the new Treasurer

Last updated - 10/10/2021

The symbol ">" means "click on"

All actions are conducted by the new Treasurer unless otherwise stated (former).

### PayPal Account: https://www.paypal.com/us/home

- 1. Logon PayPal using the email address nicawsc@gmail.com
- 2. Top right > Jeanette Stephens > Profile Settings
- 3. Update **Phone**

## Bank Account: https://www.hvcu.org/ 845.463.3011 | 800.468.3011

- 1. Former Treasurer: Call HVCU to send you a Special Account Association Information Form.
  - a. Fill in the form using the same info you used to gain access to the account.
    - b. Sign and date the first signature line.
    - c. Mail filled in form to the new treasurer.
- 2. Fill in with your information, sign, date, and mail to HVCU.
- 3. Logon Hudson Valley Credit Union with user name nicawsco
- 4. Top right > NicA WSC > Settings > Contact tab
- 5. Update > Phone Number and follow the steps to update your phone number.

# Email Address: <u>https://www.google.com/gmail/</u>

- 1. Attempt to login to **Gmail** with **nicawsc@gmail.com**. You will more than likely be blocked for a security issue due to your location not matching that of the **former** Treasurer.
- 2. The **former** treasurer's <u>recovery</u> email address will receive an email asking something like... "was that you." Reply, Yes.
- 3. Log in again. This time it should work.



#### icon > Manage your Google Account

5. Left menu > Security > Recovery email & Phone: follow the steps to set up your recovery email address & phone number.

The End

HudsonValley
P.O. Box 1071   Poughkeepsie, NY   12602-1071

Member Number:	100023465
Share ID:	0200
Share ID:	0000

845.463.3011 | hvfcu.org

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# SPECIAL ACCOUNT ASSOCIATION INFORMATION

IMPORTANT INFORMATION ABOUT THE PROCEDURES FOR ADDING ASSOCIATION INFORMATION TO AN ACCOUNT (Includes Signator, Guardian, Conservator, Executor, Administrator, or Representative Payee) To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask you for your name, address, date of birth, and other information that will allow us to identify you. We will also ask to see your driver's license or other identifying documents.

Signer's Member/Associated Member Number:			
Signer Information: Type: Drivers License Issued By:	ID#:	Date Issued:	Exp. Date:
JEANETTE STEPHENS First Name Last Name	Middle Initial	Date of Birth	Social Security Number
Residential Address City		State Zip Code	Home Phone
Mailing Address		Passcode	E-mail.
Signer's Member/Associated Member Number:		-	
Signer Information:			
Type: Issued By:	ID#:	Date Issued:	Exp. Date:
First Name Last Name	Middle Initial	Date of Birth	Social Security Number
Residential Address City		State Zip Code	Home Phone
Mailing Address		Passcode	E-mail
Signature with title		Date	
Signature with title		Date	
	HVFCU C	ONFIDENTIAL	rev. 8/15/19