



Financial Solutions for Life's Benchmarks

Account-to-Account (A2A) Transfer Service Authorization Form:

Account-to-Account (A2A) Transfers will be treated as Electronic Funds Transfers (ACH =Automated Clearing House) and require Pre-Note Verification before using this service. To conduct transfers via A2A, members must meet Benchmark's A2A Transfer Service Eligibility Criteria (no NSF Episodes in a 12 month period and new members, must auto approve for a Line-of-Credit at account opening). By submitting the A2AAuthorization Form for approval, you are giving Benchmark Federal Credit Union permission to create and send Pre-Notes on your behalf. Once you have been notified that you are approved for the A2A Transfer Service, it is your responsibility to log into Benchmark's secure Home Banking to complete the "Add an Account" Screen; which will initiate the Pre-Note Verification Process.

A2A Guidelines:

- Only allowed to setup A2A Transfers from/to one (1) Share Type per Account Number at other Institution (i.e. either Savings or Checking; NOT both).
- Member's name MUST be listed on Recipient Account at other Institution(s) to be eligible for transfers via Benchmark's A2A Service.
- Accounts that have a Basic Checking Account will be assessed a \$5.00 fee for each A2A Transfer; however, A2A Transfers are FREE for existing eChecking Accounts; as well as for all Kasasa Checking Accounts. If you are interested in switching your Basic Checking or eChecking to one of our new Kasasa Checking Accounts, please contact a Benchmark Member Service Representative for further details, or to authorize the switch.
- Transfers via the A2A Service may take up to 48 hours to be credited to your account(s).

Member's Name: _____
(Please Print)

Account #: _____

Member's Signature: _____

Date: _____

| OFFICE USE ONLY: | |
|--|------------------------------|
| _____ Approved for A2A Service | _____ Denied for A2A Service |
| If denied, letter mailed to member on: _____ | |
| _____ Approving Manager's Signature | _____ Date |
| Comments: _____ | |
| _____ | |