Spotlight on...

Ascensus Integration



Link from CU*BASE Teller to the Ascensus IRAdirect express web-based solution



Ascensus Integration



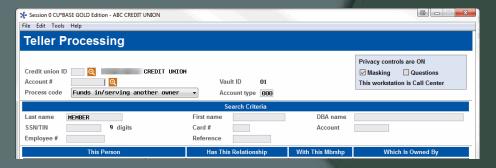
... pop-up appears...

Post in CU*BASE..

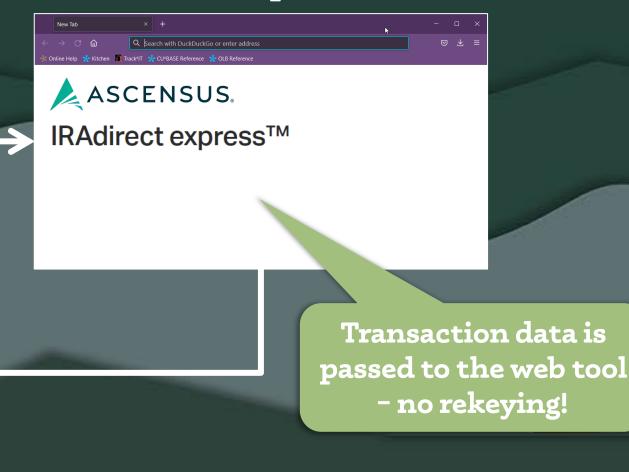


An IRA transaction was detected in the last transaction. Proceeding to third-party site for additional paperwork.

Continue



... IRAdirect express launches...



...then back to teller

Session 0 CU*BASE GOLD - ABC CREDIT UNION File Edit Tools Help			
Xpress Teller	Cash in Drawer: \$37,518,781.4	и т	ou are activated as drawer 92 ▼
Account # Go		BC CREDIT UNION	
	Consulta Adverse of		
Search memberships member	Search Advanced		
Search memberships member This Person	Search Advanced Has This Relationship		p Which Is Owned By
			,
This Person	Has This Relationship	With This Mbrsh	,
This Person Name	Has This Relationship SSN/TIN Relationship	With This Mbrsh Account # Type	Primary Name on Account
This Person Name Dr	Has This Relationship SSN/TIN Relationship ***** 5 Joint (Individual)	With This Mbrsh Account # Type 7 000	Primary Name on Account ANDY P MEMBER

Ascensus Integration



▶ IRAs and HSAs Automated workflow from CU*BASE teller posting (standard and Xpress Teller) Also when creating new savings/checking and certificate accounts **Eliminates re-keying!** Will require one-time setup & monthly maintenance fees Learn more: open.cuanswers.com/AscensusIntegration

Details are in the Kitchen!



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