



# SOUTHERN GAS FEDERAL CREDIT UNION

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## Round-Up Savings Program Request Form

Member Name: \_\_\_\_\_

Member Number: \_\_\_\_\_

I hereby request Southern Gas FCU to enroll the checking account designated below ("Checking Account") in the SGFCU Round-Up Savings Program ("Program") and I agree to the Program Terms and Conditions. When you enroll in the Program, Southern Gas FCU ("SGFCU") will round up the amount of any debit card purchase made using a debit card associated with the enrolled Checking Account to the nearest whole dollar and transfer the excess of the purchase price to the savings account ("Savings Account") designated below.

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### Enrollment:

Checking Account # \_\_\_\_\_

Round-Up Savings Account # \_\_\_\_\_

*\*Eligible Savings Accounts:* Regular 000  
Special 002  
Christmas 025  
Vacation 035

### Remove from Enrollment:

I request the following checking account be removed from SGFCU's Round-Up Savings Program. I understand this request may take up to 3 days to process

Checking Account # \_\_\_\_\_

### Terms & Conditions

Participation in the Round-Up Savings Program is at the account level. The Program is available to all personal checking accounts. Not available for business or retirement accounts.

You cannot enroll or remove individual cards associated with your Checking Account. You must submit a separate enrollment form for each Checking Account you wish to enroll or remove from the Program. Once enrolled, transfers will begin on the next business day. Purchases made on holidays and weekends will post on the next business day.

After you have enrolled in the Program, purchases made using any debit card associated with the Checking Account will be subject to Round-Up activity. SGFCU will aggregate the Round-Up amounts from all purchases that post to your Checking Account each day and make a single transfer at the end of the day.

If on any given day your Checking Account does not have sufficient available funds to Round-Up, or if any transaction has overdrawn your Checking Account, SGFCU will NOT round up purchases posted on that day. Transfers will resume the following day or on the next day that sufficient funds are available.

If a debit card purchase is subsequently canceled or reversed, the Round-Up Savings transfers will remain in the Savings Account. If you receive a new debit card due to your current card being lost, stolen, or reissued, your participation in the Program will continue. There is no need to re-enroll in the Program.

You may cancel your participation in the Program at any time by submitting this Enrollment Form and selection the "remove" option. Please note that it may take up to 3 business days to process your request.

The Program is available only on a debit card associated with the Checking Account enrolled in the Program. Purchases made using checks, ACH, or other means of payment do not qualify for participation in the Program. ATM transactions are NOT included in the Program

SGFCU may cancel or modify the Round-Up Savings Program at any time.

Member Signature: \_\_\_\_\_ Date: \_\_\_\_\_

#### Internal Use Only:

Accepted by: \_\_\_\_\_ Date: \_\_\_\_\_ Updated on CU\*Base \_\_\_\_\_