

## RoundUp

### Customer Information and Enrollment Form

Customer Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Telephone: \_\_\_\_\_

#### **RoundUp Type:**

Select one option below to save each time you use your Visa debit card:

- RoundUp my purchase to the next whole dollar
- Add an additional \$ \_\_\_\_\_ to my original transaction amount (between \$1 - \$5)
- RoundUp my purchase to the next whole dollar AND add an additional \$ \_\_\_\_\_ per transaction (between \$1 - \$5)

You can also save by automatically transferring a specific amount from your checking into your savings. This option is available within Online Banking, under "Scheduled Transfers."

#### **RoundUp Transfers FROM:** (one Checking Account)

Checking Account Number: \_\_\_\_\_

#### **RoundUp Transfers TO the Following Account(s):**

(Up to five recipient accounts with at least one common owner can be designated for equal split of the RoundUp funds.)

1.  2.  3.
4.  5.

#### **Terms & Conditions**

When you enroll in our RoundUp savings service, we round up the amount of any Visa debit card purchase made by you or any Visa debit cardholder of your Checking Account to the next whole dollar amount in excess of the purchase price (plus any additional amount you selected), and transfer that amount from your Checking Account to the designated savings or checking account(s).

We aggregate the round up from purchases that post to your Checking Account each business day and make a single transfer at the end of the business day. If on a business day you do not have sufficient available funds (\$5 minimum balance) in your Checking Account, we do not round up purchases posted on that business day and we cancel the RoundUp transfer for that day.

If your Visa debit card purchase is subsequently cancelled or reversed, the corresponding RoundUp transfer will remain in the designated account(s). We may cancel the RoundUp transfer at any time. RoundUp is available only on Visa debit cards linked to your Union Bank & Trust Company Checking Account indicated above.

If the Checking Account with RoundUp savings service is closed or all accounts receiving RoundUp transfers are closed, the RoundUp service will be canceled. You agree to notify the bank in writing if you wish to cancel the RoundUp savings service.

#### **Customer Signature:** \_\_\_\_\_

(one owner of Checking  
Account indicated above)

**Date** \_\_\_\_\_

#### BANK USE ONLY

Resp. Code: \_\_\_\_\_ Branch: \_\_\_\_\_ Date: \_\_\_\_\_