



SELECT EMPLOYER GROUP (SEG) SUPPORT AGREEMENT

Triangle Credit Union (TCU) is excited to be a premier provider of financial services to your employees. This Agreement outlines participation from both parties to ensure a successful and mutually beneficial relationship. Agreeing to these terms will assist in maximizing the benefits of our SEG Program.

In this Agreement, Triangle Credit Union will, at no cost to the employer:

- Provide financial services to your employees;
- Accept electronic transmissions from the organization's employee payroll via ACH (direct deposit and payroll deposits);
- The TCU SEG Representative will be a liaison to your organization, inform you of Credit Union benefits, and be available to assist with your organizational needs related to TCU;
- The TCU SEG Representative will contact your designated liaison periodically to discuss how we can be of additional service to your organization and ensure your organization has the tools to succeed;
- Provide marketing and educational material such as brochures, applications, posters, payroll inserts, membership welcome packets, and emailed newsletters;
- Schedule credit union staff for new employee orientation and visits as agreed upon;
- Provide employees financial education seminars and financial planning services, by Triangle Financial Group, upon request;
- Support and participate in the organization's events upon request;
- Provide financial education articles for organizations' publications upon request;
- Protect your employee's privacy and confidently hold all shared information.

In this Agreement, we ask you to coordinate with Triangle Credit Union in the following ways:

- Offer direct deposit and payroll deductions for employees;
- Designate a credit union liaison at each separate work location to serve as the contact for the TCU SEG Representative; the liaison will receive periodic correspondence/communication from the TCU SEG Representative and be responsible for distributing credit union information to employees;
- Distribute TCU Welcome Packets to all new hires;

- Assist in scheduling on-site TCU visits to enroll new members;
- Promote scheduled TCU visits via signage, email, and other available means;
- Supply the TCU SEG Representative with all available forms to enroll employees and set up direct deposit;
- Include credit union information in organization newsletters (If applicable);
- Participate in an initial rollout of credit union benefits to all employees via an organization-wide membership drive;
- Assist TCU in communicating specifically designed employee promotions via email and other channels;
- Protect our member's privacy and hold all shared information in strict confidence.

Activity or communications will only occur if mutually agreed upon by the TCU SEG Representative and the organization-designated liaison with electronic signatures below:

Organization Representative Signature

Name: _____

Date: _____

Title: _____

Email: _____

TCU SEG Representative Signature

Name: _____

Date: _____

Title: _____