



EDUCATION
PERSONNEL
FEDERAL CREDIT UNION

The Report Card

August 2025



BACK TO SCHOOL



As summer winds down and the school bells start ringing again, it's not just backpacks and lunchboxes that need your attention- your finances could use a refresh too! Whether you're a seasoned pro or just starting to organize, your money matters. Now is the perfect time to get your financial house in order before the hustle of the new school year kicks into high gear. Here are some simple, smart steps to help you stay on top:



Review and Update Your Direct Deposit

If you've already set up direct deposit, take a moment to double-check the details- especially if you've had any recent changes. Consider redirecting a portion of your paycheck into a savings account dedicated to your kid's future, or even a fun summer adventure. If you haven't set up direct deposit yet, it's a quick call to your HR department with your account and routing number.

Check Your Beneficiaries

Life is unpredictable- are your financial accounts protected? Review your beneficiary designations on accounts like your retirement plans, life insurance policies, and savings accounts. Making sure these are current can provide peace of mind, knowing your loved ones will be taken care of without unnecessary delays or complications. Just a reminder that Power of Attorney ends at death so it's very important to have someone listed as beneficiary on your accounts.

Download Our Mobile App



Managing your money should be effortless- so why not do it on the go? Download our FREE mobile app today! Instantly check your balances, transfer funds, and even deposit checks remotely by snapping a photo. Need to send money to a friend or family member that also has an account here? Just use their name and phone number- no fuss, no muss. Stay connected to your finances anytime, anywhere!



EDUCATION PERSONNEL FEDERAL CREDIT UNION

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Don't Be Late! Let Us Help You Pay Your Tuition Bill



Classes are starting and your tuition bill is due soon! Don't miss the deadline! Pay your tuition with a low-rate student loan.

We'll help pay for college when federal aid is not enough, whether you're a cosigner or a student.

- Discover your pre-qualified rates in just two minutes, with no impact on your credit score.
- Customize your payment and loan terms to achieve your ideal payment and schedule.
- Visualize the impact of your loan options on the total loan cost before making a decision.



We're committed to supporting you in achieving your educational and personal dreams. Let us help you finance your degree and invest in your future.

Visit the Student Loans tab on our website to learn more about our college financing solutions.

Employee Spotlight

This month, we're excited to shine the spotlight on Haley Pickett, who joined our team in February! Since starting with us, Haley has rediscovered her love for customer service and engaging with members.

She's appreciated how welcoming and supportive everyone has been as she is learning the ins and outs of her role. Outside of work, Haley enjoys shopping, doing puzzles, and reading.

She also cherishes spending quality time with her family, boyfriend, and her adorable dogs. We're thrilled to have Haley as part of our team and look forward to seeing her grow and succeed here!



CLOSED



Monday,
September 1st



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SIZZLE
YOUR SAVINGS**

SAVOR THE TASTE OF
A BETTER INTEREST
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LOW BALANCE
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FOR 6
MONTHS**

When you transfer an
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between June 1, 2025
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Ask us about this special
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Balance transfers completed 6.1.25-9.1.25 will receive 1.99% APR for 6 months. After the promotional time frame expires, remaining balances will migrate to the standard APR applicable on your account. Contact the credit union for complete details. * APR=Annual Percentage Rate



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