



How do I share access to my account?

- 1.) Visit www.winsouthcu.com and sign in to your online banking.
- 2.) Once in, select the “Additional Services” tab and choose share access.
- 3.) From there, you’ll select “add person” and enter their contact information and select the account(s) that you want them to have access to. You can also select if they have access to transfer money or just view only.
- 4.) Review and accept the terms and conditions
- 5.) The rest of the steps will be up to the person that the account is being shared with to complete.

Important next steps:

The person with shared access will need to:

1. Open the link sent to their email.
2. Verify their identity by phone.
3. The person will then be able to log in to your account with their own username and password.

To remove a user from sharing access:

- 1.) Visit www.winsouthcu.com and sign in to your online banking.
- 2.) Once in, select the “Additional Services” tab and choose Share Access.
- 3.) You’ll see a list of people who have shared access to your online banking.
- 3.) You can either toggle the access on or off, or you can remove the profile completely.
- 4.) To remove the profile, click “options” and select “remove profile”

***The shared access feature can only be set up and utilized through online banking.**