

Patelco Credit Union Launches Virtual Branch Connecting Members with Real-Time Branch Visits Online

Bay Area Credit Union Also Rolls Out Series of Digital Enhancements in Ongoing Commitment to Bring the Best Products and Services to Members

DUBLIN, CALIFORNIA - April 21, 2021 — Patelco Credit Union, a Bay Area-based credit union dedicated to improving members' financial health, is making banking even easier for its 400,000-plus members. The credit union's new Virtual Branch has all the services expected from a regular branch, but it's online, making the experience more convenient and accessible for many members. Secure, simple to use and available during normal business hours, Patelco's Virtual Branch allows members access to many of the same services as an in-person visit.

Patelco tested its Virtual Branch with some of its members earlier this year and the response was overwhelmingly positive. Member feedback noted the experience was easy and they valued being able to connect with branch employees virtually. Now, all members can access the Patelco Virtual Branch with a few simple steps:

1. Download the Zoom app on a mobile device or computer
2. Visit patelco.org/locations and look for the virtual branch – it's the first listed location
3. Select the Meet Now button to be connected to a Patelco team member

"In our mission to serve and support the financial well-being of our members, we're investing in digital offerings and enhancements that empower smart financial decisions and deliver a seamless experience with real-time access to information and support," said Erin Mendez, president and CEO, Patelco Credit Union. "Our size and structure allow us to stay nimble and pivot quickly to bring services like our Virtual Branch, among others, to members over the past year."

Delivering the ultimate convenience and service to members has remained a top priority to Patelco throughout the pandemic. In addition to launching its Virtual Branch, the credit union launched the following digital enhancements to support its ongoing commitment to bring the best service and products to members:

- **Digital Appointment Scheduler** lets members book an appointment at their convenience
- **Simplified Member Loan Process** via a Salesforce Lightning Upgrade delivering a seamless member experience across all platforms, including desktop, tablet, and mobile
- **Auto Loan Live Chat** with a Patelco team member during regular business hours
- **Fast Pay** auto loan payments within one minute
- **Switch to Save Calculator** that allows anyone to compare their side-by-side savings by refinancing
- **Check My Rate Auto Loan**, a three-second online pre-qualification for auto loans that sparked more than 1,000 interactions in the first 15 days online
- **Zelle[®]** allowing members to send money to family and friends quickly directly from the Patelco Mobile App
- **Bank-to-Bank Payment** allowing members to digitally move money easily and quickly between banks without using paper checks, wire transfers, credit card networks, or cash

"Our digital enhancements allow our members greater convenience, efficiency and access to financial resources than ever before," continued Mendez. "We have more improvements in development that we look forward to rolling out throughout the year as we remain dedicated to making a meaningful difference in our members' financial lives."

Dublin, Calif.-based Patelco Credit Union is a not-for-profit credit union committed to serving the financial health and wellbeing of its membership. With more than 400,000 members primarily in and around northern California, Patelco is committed to improving their members' financial well-being and fueling hope and opportunity for its members by offering personalized solutions, advice, and expertise that empower them to achieve personal financial freedom. Founded in 1936 with \$500 in assets by employees of the Pacific Telephone and Telegraph Company, Patelco is in the top one percent of U.S. credit unions with more than \$8 billion in assets. For more information, visit <https://www.patelco.org/>.

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