

IslandSavings

A DIVISION OF FIRST WEST CREDIT UNION



HOW TO: CONSOLIDATE MEMBERSHIPS

1. LINK A MEMBERSHIP

When logged-in to Online Banking, from the left panel menu:

- Select "Services"
- Select "Consolidate Memberships"

When the page loads:

- Click "Link a Membership"

The screenshot displays the Island Savings online banking interface. On the left is a dark sidebar menu with the following items: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (expanded), Manage Delegates, Consolidate Memberships (highlighted), Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements, Refer Us, Profile, Message Centre, and Security Settings. The main content area is titled "Consolidated Memberships" and features a message: "You haven't consolidated any memberships yet". Below this message is a "Link a Membership" button. A "Back" button is also visible. The top right of the page shows the user's name "Welcome Price Plumbing SA", the last login time "Last login: Mon, 11 May 2026, 11:16 AM, PST via Internet Banking", and a "Logout" button. A promotional banner for "SMART SAVINGS, STEADY RETURNS" is also present.

IslandSavings

A DIVISION OF FIRST WEST CREDIT UNION

2. ENTER CREDENTIALS

Add required information for the membership you wish to add

- Enter username
- Enter Password

Click Continue

Note: The membership you're linking must already be set-up in our new Online Banking experience

The screenshot displays the Island Savings online banking interface. On the left is a dark sidebar menu with the following items: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an upward arrow), Manage Delegates, Consolidate Memberships (highlighted), Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a downward arrow), Refer Us, Profile, Message Centre, and Security Settings (with a downward arrow). The main content area is titled 'Link a Membership' and includes a welcome message for 'Price Plumbing SA' with a 'Logout' button. Below the title, it instructs the user to enter their username and password for consolidation. The 'Username' field contains 'NewUsername' and the 'Password' field is masked with dots. At the bottom of the form are 'Back' and 'Continue' buttons. On the right side of the page, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS.' and a 'Useful Links' section with links for 'Offers' and 'Get a Second Opinion'.

3. REVIEW AND CONFIRM

- Check the membership information is accurate

Click Confirm

The screenshot displays the Island Savings web interface. On the left is a dark sidebar with the 'Island Savings' logo and a menu search bar. The menu items include Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services, Manage Delegates, Consolidate Memberships (highlighted), Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements, Refer Us, Profile, Message Centre, and Security Settings. The main content area is titled 'Consolidated Memberships' and includes a 'Confirmation' section with instructions to review membership information and tap on 'Confirm'. Below this is a table with the following data:

Member name	John X Hopper
Member number	8292
Branch name	Mill Bay

Below the table is a note: 'Consolidated memberships are not automatically shared with business delegates. To allow a delegate to access the consolidated membership (if applicable), the business signer must edit the delegate and select the account(s) to be shared.' At the bottom of the confirmation area are three buttons: 'Back', 'Cancel', and 'Confirm'. The top right of the page shows the user's name 'Welcome Price Plumbing SA', a mail icon, and a 'Logout' button. A last login timestamp is also present: 'Last login: Mon, 11 May 2026, 11:16 AM, PST via Internet Banking'. On the right side, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS' and a 'Useful Links' section with links for 'Offers' and 'Get a Second Opinion'.

FAQs

How many memberships can be added?

Each signer for a business membership can have up to **five** consolidated accounts within Business Online Banking.

Signers will only be able to view the consolidated accounts (e.g. retail memberships) they own and/or are listed as a signer for the membership.

How do I remove a membership?

1. Click "Services"
2. Click "Consolidate Memberships"
3. Click "Unlink" on the account you wish to remove
4. Click "Confirm"

The screenshot displays the Island Savings website interface. On the left is a dark sidebar menu with the following items: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an upward arrow), Manage Delegates, Consolidate Memberships (highlighted in light pink), Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a downward arrow), Refer Us, Profile, Message Centre, and Security Settings (with a downward arrow). The main content area is titled "Link a Membership" and features a large white box with a green checkmark icon. Below the icon, the text reads "You're all set!" followed by "A membership has been linked." and a "Transaction Details" link with a downward arrow. A black button labeled "Back to Consolidated Memberships" is positioned below this box. In the top right corner, the user is identified as "Welcome Price Plumbing SA" with a mail icon and a "Logout" button. Below this, it shows "Last login: Mon, 11 May 2026, 11:16 AM, PST via Internet Banking". On the right side, there is a promotional banner for "SMART SAVINGS, STEADY RETURNS." with a photo of a family and the text "Find a term deposit that fits your financial goals. Explore now >". Below the banner is a "Useful Links" section containing "Offers" and "Get a Second Opinion", both with external link icons.