



OFX Gateway™

An Internet Banking Solution for PC-Based
Financial Management Systems



Do you want to give members an easy way to transfer data to and from third-party software?

BUSINESS VALUE

- Improve Operations

COMPATIBILITY

- Episys®

Today's members need full access to account information for use in accounting, tax, and financial management systems.

IT WORKS LIKE THIS ...

Many individual and commercial credit union members use PC-based financial management systems. OFX Gateway enables them to securely access and interact with their credit union account data. It creates two-way communication to allow an exchange of account information with a financial management solution.

This technology uses industry-certified Open Financial Exchange (OFX) standards and protocols, and supports products such as QuickBooks® and Quicken®. OFX Gateway enables credit unions to expand electronic offerings with a high-demand financial management service and generate new fee income opportunities based on information access and usage. It enhances customer loyalty, service, and self-sufficiency.

It creates two-way communication to allow an exchange of account information with a financial management solution.

WHAT IT DOES:

- Enables members who use PC-based financial management systems to securely access their credit union accounts to exchange information.
- Supports the leading PC-based financial management solutions including QuickBooks and Quicken products.
- Uses industry-certified Open Financial Exchange (OFX) standards and protocols.
- Provides full integration with Episys core processing.

WHAT IT DOES FOR YOU:

- Enables credit unions to expand their electronic offerings with a value-added, high-demand financial management service.
- Supports both individual and commercial members with immediate access to current financial information.
- Increases member self-sufficiency.
- Generates new fee income opportunities based on information access and usage.
- Enhances member loyalty and service.
- Increases member convenience and control over accounts and financial management.

OFX Gateway enhances customer loyalty, service, and self-sufficiency.