

DAVY

my **DAVY**  
for credit unions

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**myDavy for credit unions** is an easy way to access your portfolio online, helping you view all of your investments in one place, whenever you want - all in a completely secure environment.



**Key benefits include:**

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**Online correspondence**

It's a lot more secure to receive and store your account correspondence at myDavy for credit unions. Online correspondence is also better for the environment because it reduces the amount of paper you receive from us.

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**Seamless Access**

Designed with mobile and tablet in mind, myDavy for credit unions enables you to access the service via the device of your choice with no compromise in quality.

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**Single view of your investments**

Now you can conveniently view all your investments within in your portfolio valuation in a downloadable excel format, along with all contract notes.

# Registration form: myDavy for credit unions

This registration form must be signed by two authorised signatories who have been listed on your Credit Union Consultancy Services Account Opening Mandate. Please use BLOCK LETTERS when filling in the below form.

Credit union name and address:

Contact name within credit union:

Insert user details below:

FIRST NAME	SURNAME	EMAIL	MOBILE NUMBER
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
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Your email address(es) will be used for alerts if you choose to receive online correspondence.

For additional security purposes, an authentication code will be sent to your mobile phone(s) by SMS each time you log into myDavy for credit unions. This authentication code must be used in addition to your username and password before you can access the myDavy for credit unions.

I/We would like to access **myDavy for credit unions** and request Davy to send me/us a username and password. I/We confirm that the person(s) detailed above has been notified that their personal data is being held for those purposes by Davy.

I/We would like to receive **online correspondence** such as contract notes and valuations as they become available online in place of paper copies by post. (Please note that online correspondence is only available if you currently have access to myDavy for credit unions or if you choose to register for myDavy for credit unions above).

By signing this registration form, we confirm that the information above is correct and if this information changes, we will notify Davy immediately in writing, including any change to a user of myDavy for credit unions or an authorised signatory of the credit union. We acknowledge that each user is responsible for the security of their individual usernames and passwords. I/we undertake to inform Davy in writing of any changes. I/We have read and accepted the terms and conditions of service for online correspondence set out in the Davy terms of service.

Authorised Signatory 1 as per Davy Mandate

Authorised Signatory 2 as per Davy Mandate

Print Name

Print Name

Date

Date

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# How to register for myDavy for credit unions

1. Please complete the enclosed myDavy for credit unions registration form and send it back to us. You can post it to us at Davy Credit Unions Support Team, Davy, 49 Dawson Street, Dublin 2 or email the scanned copy to [#creditunionsupport@davy.ie](mailto:#creditunionsupport@davy.ie).
2. We will forward you a username and details of how to access the portal.

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# How to switch to online correspondence

Complete the registration form enclosed and tick the box to agree to receive your Credit Union Consultancy Services account correspondence online.

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As a valued client of Davy, this communication has been sent to you as part of our service offering. If you are not a client of Davy, you can opt out of further similar communications at any stage by emailing [creditunions@davy.ie](mailto:creditunions@davy.ie). The Davy Group Privacy Notice can be found at [www.davy.ie](http://www.davy.ie).

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