



I have two checking accounts that show and I want to name them differently so I can easily identify them. How do I do that?

Click on the 'Accounts' tab. When you see the account you want to change the name of, click the cog wheel icon on the right hand side.

The screenshot shows the myPioneer 'Accounts Overview' page. The left sidebar contains navigation options: Dashboard, Accounts (highlighted), Move Money, Cards, Mortgage, Additional Services, and Activity Since. The main content area shows 'Banking > Accounts' and 'Accounts Overview'. There are filters for 'Group by' (Account type), 'Filter by' (All memberships), and 'All Accounts'. A 'Checking Accounts' section is visible, listing 'PERSONAL CHECKING 0040' with an available balance of \$5,352.19 and a current balance of \$5,410.19. A red box highlights a gear icon (cog wheel) in the top right corner of the account card, indicating where to click to access account settings.

You can rename your accounts on this page in the Account Name field:

The screenshot shows the myPioneer 'Accounts and Memberships' page. The left sidebar is the same as in the previous screenshot. The main content area shows 'Banking > Accounts > Accounts and Memberships'. There are tabs for 'Account Settings' and 'Membership Settings'. The 'Account Settings' tab is active, showing 'Select Account' with 'PERSONAL CHECKING 0040' selected. Below this, it says 'You can edit the following settings for this account.' A red box highlights the 'Account Name' field, which currently contains 'PERSONAL CHECKING'. Below the field is the 'Account Visibility' section, which includes a 'Note' and two radio buttons: 'Show Account' (selected) and 'Hide Account'.



2. Member has an account they are not able to see.

Mobile: Go to hamburger menu on the app > Click on Accounts and Membership > Go to Member setting at top and below is add membership.

