



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 Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an upward arrow), Manage Delegates, Consolidate Memberships (highlighted in a light beige bar), 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 'Consolidated Memberships' and features a large orange question mark icon. Below the icon, the text reads: 'You haven't consolidated any memberships yet'. A sub-header states: 'Consolidating your memberships allows you to view all of them with a single login. You may consolidate up to 5 additional memberships.' Below this, a message says: 'Please click on "Link a membership" button below to start consolidating memberships.' A prominent black button with a white link icon and the text 'Link a Membership' is centered. Below it is a 'Back' button. In the top right corner, the user is logged in as 'Welcome Leeds Properties' with a profile icon, and the last login is noted as 'Fri, 1 May 2026, 6:24 PM, PST via Internet Banking'. There is also a 'Logout' button. 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'.

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 Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an expand/collapse arrow), Manage Delegates, Consolidate Memberships, Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a dropdown arrow), Refer Us, Profile, Message Centre, and Security Settings (with a dropdown arrow). The main content area is light-colored and titled 'Link a Membership'. At the top right of the main area, it says 'Welcome Leeds Properties' with a user icon 'OB', a mail icon, and a 'Logout' button. Below this, it indicates the last login: 'Last login: Fri, 1 May 2026, 7:08 PM, PST via Internet Banking'. The 'Link a Membership' section contains a sub-header and a brief instruction: 'Enter the username and password below for the membership you wish to consolidate (link) and click "Continue".' There are two input fields: 'Username' with the value 'GregoryDaniel' and 'Password' with masked characters '.....'. Below the fields are two buttons: 'Back' and 'Continue'. To the right of the main content area, 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 with two links: 'Offers' and 'Get a Second Opinion', both with external link icons.

3. REVIEW AND CONFIRM

- Check the membership information is accurate

Click Confirm

The screenshot displays the Valley First online banking interface. On the left is a dark sidebar menu with the Valley First logo at the top. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with a dropdown arrow), Manage Delegates, Consolidate Memberships (highlighted in white), Pending Transactions, Transaction Audit Trail, Order Cheques, Stop Payments, Setup CRA Direct Deposit, Documents and Statements (with a dropdown arrow), Refer Us, Profile, Message Centre, and Security Settings (with a dropdown arrow). A search bar labeled 'Menu Search' is located below the logo.

The main content area is titled 'Confirmation' and contains the following text: 'Please review the membership information below and tap on "Confirm".' and 'By clicking "Confirm" you certify that this membership belongs to you and that you are authorized to consolidate and access it.' Below this is a table with the following information:

Member name	Primary R Primarysecauth
Member number	711
Branch name	Peachtree Square

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'.

In the top right corner, the user is logged in as 'Welcome Leeds Properties' with a profile icon, a mail icon, and a 'Logout' button. Below this, it says 'Last login: Fri, 1 May 2026, 7:13 PM, PST via Internet Banking'.

On the right side of the main content area, there is a promotional banner for 'SMART SAVINGS, STEADY RETURNS.' with the text 'Find a term deposit that fits your financial goals. Explore now >' and an image of three people. Below the banner is a 'Useful Links' section with two links: 'Offers' and 'Get a Second Opinion', each with an external link icon.

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 ValleyFirst Business Online Banking interface. On the left is a dark sidebar menu with the ValleyFirst logo at the top. The menu items include: Home, Accounts, Pay Bills, Pay Business Taxes, Interac e-Transfer®, Transfer Money, Services (with an upward arrow), Manage Delegates, Consolidate Memberships (highlighted in light grey), 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 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 the text. In the top right corner, the user is identified as "Welcome Leeds Properties" with a profile icon and a "Logout" button. Below this, it shows "Last login: Fri, 1 May 2026, 7:13 PM, PST via Internet Banking". On the right side of the main area, there is a promotional banner for "SMART SAVINGS, STEADY RETURNS." with an "Explore now" link and a "Useful Links" section containing "Offers" and "Get a Second Opinion" links, both with external icons.