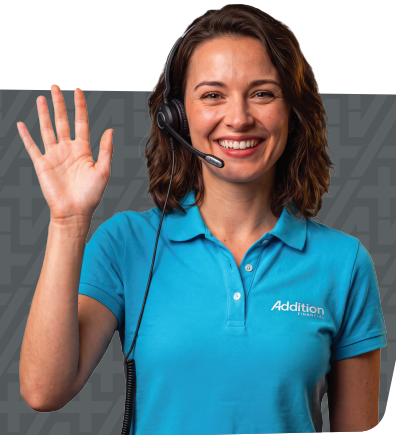


HOW TO TALK TO ADDI



Welcome to your guide for interacting with our telephone virtual assistant, Addi! This guide is designed to help you communicate effectively with Addi, ensuring you get quick and accurate answers to all your financial questions.

Addi is here to assist you with a wide range of inquiries, including accounts, loans, services, and various how-to questions. To get started, simply ask Addi a question in a complete sentence, just as you would speak to a human agent.

The below service scenarios are examples to help you get started. They're not a complete list of what Addi can do. Feel free to ask Addi about your banking needs in your own words—you may be surprised by how much she can help with!

1. NAVIGATING WITH ADDI

Getting lost in a conversation or missing key information can be frustrating. But you can use these utterances to efficiently manage the chat flow, allowing you to quickly return to the main menu or ask Addi to repeat the last question for seamless clarification.

Use Case	What to Say
Get to the main menu.	Can you return me to the main menu?
Repeat the last question.	Can you repeat that for me?



2. CONNECT TO A TEAM MEMBER

For complex issues and support, Addi will be very happy to connect you with a live team member.

Use Case	What to Say
Talk to an agent.	I want to talk to an agent.

3. REPORT A FRAUD

When you spot suspicious activity, you need an immediate and direct way to alert the institution. With this utterance, Addi can instantly initiate the process for addressing and investigating suspicious activity on your accounts.

Use Case	What to Say
Report a fraud/suspicious activity.	I want to report a fraud.

4. BALANCE INQUIRES

Ask Addi for the balances of all accounts or specify the account name to check a specific balance, making it simpler than ever to review your financial standing.

Use Case	What to Say
Check all account balances.	I want to check my balance.
Check a specific account balance.	I want to check my [account name] balance.

5. TRANSFERRING MONEY

Addi can help you to quickly initiate a general internal transfer, specify the source and destination accounts, or even include the exact amount you wish to transfer.

Use Case	What to Say
Transferring between a list of available existing internal accounts.	I want to make an internal transfer.
Transfer money from one internal account to another.	I want to make an internal transfer from my [account_name] to my [account_name].
Transfer x amount of money from one internal account to another.	I want to make an internal transfer of [amount] from my [account_name] to my [account_name].
Learn how to pay bills.	I want to pay a bill.

6. LEARN YOUR TRANSACTION HISTORY

Finding a specific transaction can be difficult when sifting through pages of account history. With these utterances, Addi can assist in easily reviewing your financial activity by allowing you to request recent transactions for a general time period or search for history spanning a precise date range by specifying the start and end dates.

Use Case	What to Say
Learn about your recent transactions for a specific time period (e.g., last/this week, month, or year).	Show me [last/this] [week/month/year] transaction from my [account name].
Learn about your transaction for a particular date range.	Show me transactions from [start_date] to [end_date] 2025 from my primary savings account.

7. BRANCH DETAILS

Just ask Addi for a list of branches, and she'll provide location addresses and hours of operation to help you find the branch that's right for you.

Use Case	What to Say
Find a branch	Can you find a branch in [city]?

8. RESTORE ACCESS

Being unable to access Digital Banking and your accounts can be stressful, and you need a quick way to report the issue. Addi can assist you in reporting that you are having trouble accessing your accounts.

Use Case	What to Say
Restore access to your [debit or credit] card.	I am having trouble using my [debit or credit] card.
Restore access to Digital Banking.	I am having trouble logging in to Digital Banking.