

Upromise GoalSaver Bonus Disclosures

Cash rewards will post to Upromise GoalSaver Account(s) in the form of interest payments and are subject to taxable income rules. Upromise may change or terminate the 10% annual match and/or bonus offers at any time without notice. Each cash reward program is subject to individual eligibility requirements:

10% Match Annual Reward

- Link your Upromise GoalSaver Account to your Upromise Rewards Account and either: 1. Within 90 days of opening your Upromise GoalSaver Account, make your first of at least 10 credit/deposit transactions, initiated from your Upromise GoalSaver Account, into the Upromise GoalSaver Account and complete at least 10 credit/deposit transactions, initiated from your Upromise GoalSaver Account, within the anniversary year or 2. Within 90 days of opening your Upromise GoalSaver Account, fund your Upromise GoalSaver Account with \$5,000 or more and maintain an average daily balance of \$5,000 or more during the 12 months from account opening.
- Should you fail to meet the requirements during the anniversary year, you will have the opportunity to become eligible for the 10% match in additional years if, by your anniversary date, you (a) link your Upromise GoalSaver Account to your Upromise Rewards Account, and (b), you either meet the \$5,000 average daily balance minimum funding requirement, or you meet the 10 Upromise GoalSaver Account initiated credit/deposit requirement in the anniversary year.
- If you qualify for the 10% match based on having the average daily balance of \$5,000 in your Upromise GoalSaver Account, you must maintain that average balance in your Upromise GoalSaver Account for the duration of the anniversary year for which your transferred earnings will be matched.
- Once you complete the steps above, Upromise will match 10% of your Upromise earnings that you transfer from your Upromise Rewards Account into your Upromise GoalSaver Account during each anniversary year.
- Your match will be deposited into your Upromise GoalSaver Account within 60 days after your anniversary date, provided that both accounts remain active at time of transfer.
- Please refer to [GoalSaver FAQs](#) for additional information.

\$10 Annual Bonus

- \$10 Annual Bonus will post to your Upromise GoalSaver Account within 60 days of the completion of each anniversary from the date your Upromise GoalSaver Account was opened.
- To be eligible for the bonus each year, you must have a recurring deposit, initiated from your Upromise GoalSaver Account, post at least 10 out of the 12 months in an amount not less than \$10 each deposit and your account must be in an open status at the time of bonus posting.

\$100 Loyalty Bonus

- \$100 will post to your Upromise GoalSaver Account within 60 days of the completion of the 3rd year anniversary of when your Upromise GoalSaver Account was opened.
- To be eligible, the Upromise GoalSaver Account must maintain at least \$0.01 up until the day before the 3rd anniversary date, a \$5,000 balance must be reached by and remain in the account on the 3rd anniversary date and the Upromise GoalSaver Account must be in an open status at the time of bonus posting.