

SOLUTIONS

WINTER 2020

Tax Season Is Here! Are You Prepared?

April 15th is just a few months away and it is important to ensure your account information is up to date and accurate.

CHECKLIST



Correct Address

Confirm your address is up to date with County Federal. If we were a source of earned income or you have a home loan with us, you'll have a 1099 or 1098. Login to online banking to double check your information.



Correct Phone Number

Haven't gotten around to adding your new mobile number? Now is the time to make sure your phone number is correct and you don't miss out on any important communications.



Direct Deposit Information

Review your information (account and routing numbers) to confirm your funds will be added to the correct account.



Check Categories & Notes

If you've used the Category & Note feature in Online Banking, we recommend downloading and reviewing your account notes for any discrepancies over the year.

Tax Preparation Help

Let County Federal help prepare your taxes. We have once again partnered with the Internal Revenue Services (IRS) and United Way Bay Area's "Earn It! Keep It! Save It!" Volunteer Income Tax Assistance (VITA) program to help provide free tax preparation to households earning less than \$56,000 a year. Appointments with IRS-certified volunteers are available every Thursday starting February 6 through April 9, 2020. To schedule your appointment, visit us online at www.sccfcu.org/vita-assistance/ or contact us at (408) 282-0700. Space is limited, and appointments will only be made available to members of County Federal.



Save the Date!

Annual Member Meeting

**Tuesday,
April 28th
6pm**

**COUNTY FEDERAL
CORPORATE CENTER**
1641 N. First Street
at Sonora Ave.
San Jose, CA 95112



**Get Your
Maximum Refund
Guaranteed**

Members save up to \$15 on TurboTax Federal products. Learn more at www.sccfcu.org.



COUNTY FEDERAL 2020 EDUCATIONAL SCHOLARSHIP PROGRAM

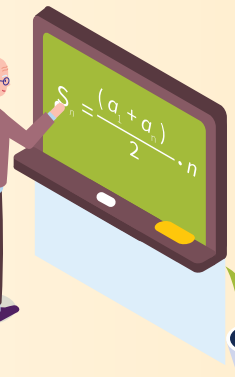
Specifically designed for our members, County Federal awards educational scholarships to graduating high school seniors and post-secondary students enrolled in an accredited university or community/technical college, full or part-time.

What You Need to Know About The Program

- Awards range from \$500 to \$1,500.
- All participating students are required to complete an application, write an essay and include a copy of a current high school/college transcript.

- Scholarships will be judged on completing an online financial education learning playlist (5%), GPA (10%), community and high school involvement (15%) and an essay (70%).
- The application period is open from February 7th – April 11th.

For complete Educational Scholarship Program details and to download the application, visit www.sccfcu.org/educational-scholarships.



Nominations for Board of Directors

The Nominating Committee Has Selected the Following Candidate for A Board Seat

Peter Ng

Mr. Ng has served on the Board of Directors since 2001 after joining the Supervisory Committee in 2000. He has been the Chair of the Board of Directors since 2016.

Mr. Ng is currently retired after 29 years of public service with Santa Clara County, Santa Clara Valley Water District and the City of Sunnyvale. He holds a Bachelor of Science in Business Administration degree from San Jose State University.

Nominating Petitions Welcome

Nominations for vacancies may also be made by petition. Members have 30 days from the date of this notice to submit a petition for nomination. Petitions are to be submitted to:

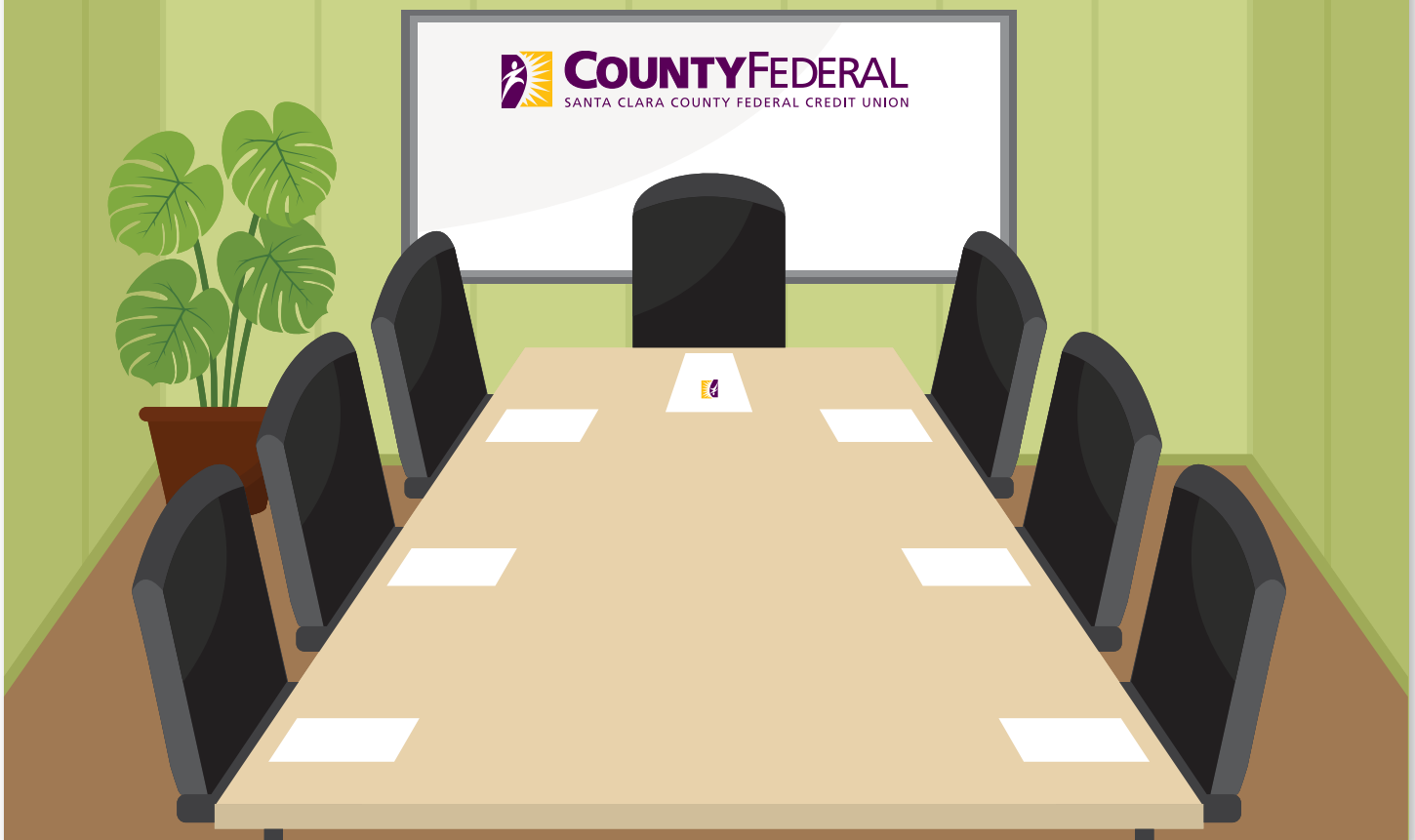
Nominating Committee Chairperson

c/o Jim Guss

Santa Clara County Federal Credit Union

1641 N. First St., Suite 130 | San Jose, CA 95112

Members may direct questions to: Jim Guss, Executive Assistant



Clear the Clutter

Electronic Recycling and Shred Event

Do you need to get rid of that old clunky television in the garage?



Well, recycle it at our upcoming event! Shred up to three boxes of confidential papers and recycle all old computer/electronic equipment including:

- Desktops, laptops, and tablets
- Monitors and televisions
- Printers, copy, and fax machines
- Telephones and cell phones

Canned Food Drive

Share what you can by donating to The Health Trust Jerry Larson FOODBasket. We believe everyone should have the opportunity to be healthy – especially the most vulnerable.

The Health Trust is requesting:

- Beans, corn, peas, and tomatoes
- Chicken
- Tuna in water
- Low-sodium soup
- Peaches/pears in juice
- Low-sodium pasta sauce
- Stew/broth



**Saturday,
March 21, 2020
9 am to 1 pm**

County Federal Corporate Center
1641 N. 1st St., San Jose, CA 95112
(Cross Street Sonora Ave.)



Branch Locations & Hours

CORPORATE CENTER
1641 N. 1st St., Suite 170
San Jose, CA 95112
(408) 282-0700 / (800) 282-6212

Contact Center
Monday - Friday 8 am - 6 pm
Saturday 9:30 am - 2:30 pm

Almaden Branch*
5353 Almaden Expressway, Suite 65
San Jose, CA 95118

Campbell Branch*
Kirkwood Plaza
1638 W. Campbell Avenue
Campbell, CA 95008

City Centre Branch
140 E. San Fernando
San Jose, CA 95112

East San Jose Branch*
255 N. White Road, Suite 112
San Jose, CA 95127

Gilroy Branch*
6915 Camino Arroyo, Suite 50
Gilroy, CA 95020

West Hedding Branch
70 West Hedding Street (Lower Level
inside the County Building)
San Jose, CA 95110
Hours: Monday - Friday 9 am - 5 pm

HOURS
Monday - Thursday 10 am - 5:30 pm
Friday 10 am - 6 pm
*Saturday 10 am - 2 pm

Financial Profile

(As of 12/31/2019)
Assets.....\$807,096,460
Loans.....\$500,668,207
Shares.....\$668,425,233
of Members.....51,413

ROUTING NUMBER: 321176972
NMLS #: 415778

The articles and opinions in this publication are for general information only and are not intended to provide specific advice for any individual. We recommend that you consult your attorney, accountant or financial or tax advisor with regard to your individual situation. Entire publication ©Santa Clara County Federal Credit Union 2020. All rights reserved.

County Federal: Holiday Schedule (All branches will be closed)

President's Day
Monday, February 17, 2020

Cesar Chavez Day
Tuesday, March 31, 2020

BOARD OF DIRECTORS & EXECUTIVE LEADERSHIP TEAM

EXECUTIVE LEADERSHIP

Rebecca Reynolds Lytle
President & Chief Executive Officer

Joe Bonacci
Senior Vice President & Chief Information Officer

Ie-Chen Cheng
Senior Vice President & Chief Financial Officer

Divine David
Senior Vice President & Chief Experience Officer

Jennifer Montero
Senior Vice President & Chief Administrative Officer

BOARD OF DIRECTORS

Peter Ng
Chair

Jose Luis H. Pacheco
Vice Chair

Deborah Baker
Director

Dave Cameron
Director

David Indra
Director

Juan Ledesma
Director

SUPERVISORY COMMITTEE

Traci Hess
Chair

Lesha Luu
Member

Candace Nisby
Member

Maria Oberg
Member

David Indra
Board Liaison



Your savings are federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government.
National Credit Union Administration, a U.S. Government Agency.

