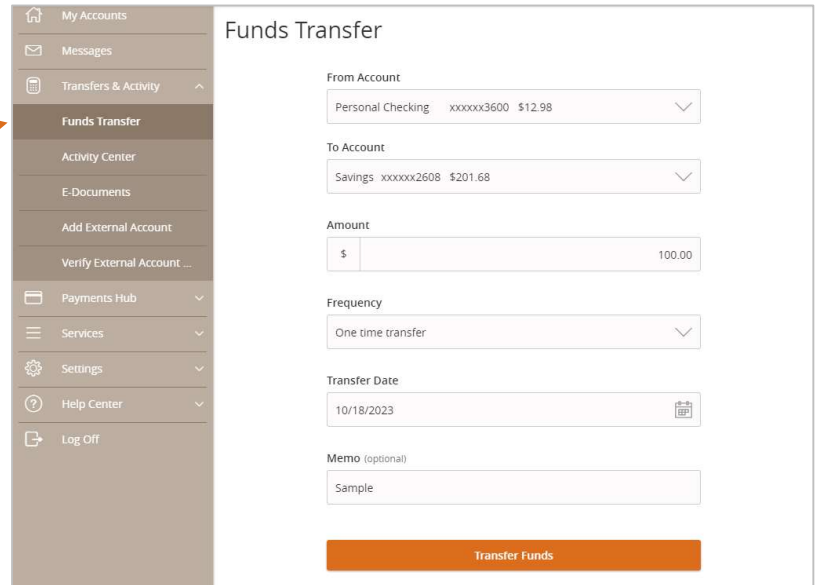# One Time Transfers

1. Select the 'Transfer Funds' option under the 'Transfers & Activity' menu.

2. Select a 'From' account from the drop down menu.

3. Select a 'To' account from the drop down menu.

4. Select a 'Payment Type' from the drop down menu.

5. Enter a dollar amount for the transfer.

6. Select a 'Date' for the transfer.

NOTE: The date for the transaction may be the current day or a future date. Same day transfers occur in real-time.

7. Enter a 'Memo' (This is an optional step)

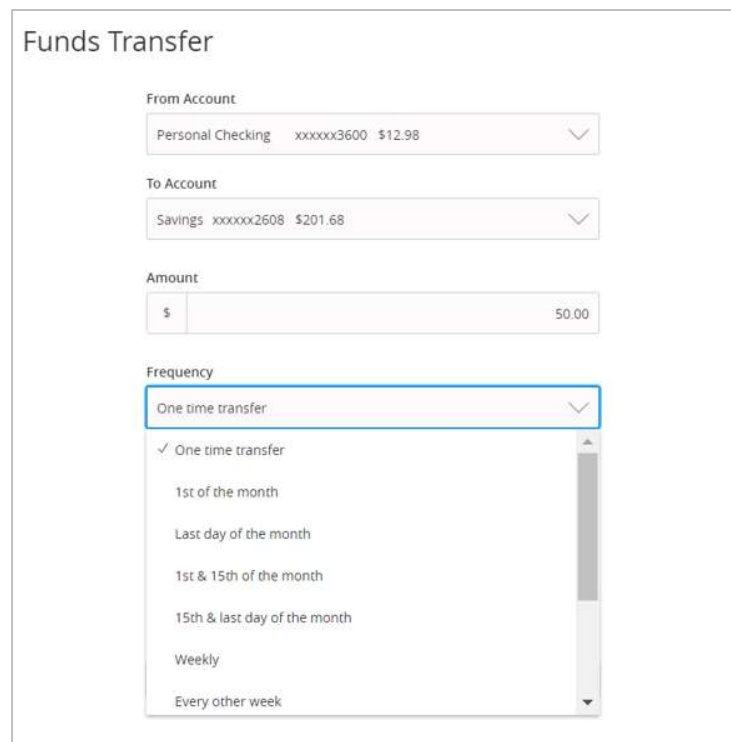8. Click the 'Transfer Funds' to submit the transaction.

Recurring Transfers

1. Select a 'From' account from the drop down menu.

2. Select a 'To' account from the drop down menu.

3. Enter a dollar amount for the transfer.

4. Select the desired frequency for the transfer from the drop down menu.

5. Select a 'Start Date' and an 'End Date' for the recurrance.

6. Select the desired duration for the recurrence.

7. Enter a 'Memo' (This is an optional step)

8. Click the 'Transfer Funds' to submit the transaction.

Frequency

Monthly ⌄

ⓘ A transfer will be created every month on the 18th.

Start Date

10/18/2023 📅

ⓘ Transfers falling on a Sunday or banking holiday will be processed the following business day.

Repeat Duration

● Forever *(Until I Cancel)*

○ Until Date *(Set An End Date)*

Memo (optional)

Sample

Transfer Funds