



Mobile Business/Fiduciary External Account Transfers

Securely move money between your Credit Union business/fiduciary account and accounts at other financial institutions.

External Account Transfers Step-by-Step

Use the following steps to set up an external transfer.

Step	Action
1	Tap the Transfer menu at the bottom of the screen.
2	Tap the Add an External Account hyperlink at the bottom of the screen.
3	If prompted to review a disclosure, tap I Accept to continue. If not, simply continue.
4	Tap to select the Verification Method (Text, Voice, or Email) using the drop-down arrow.
5	Tap and enter either a 10-digit Phone Number or an Email Address using the drop-down arrow to receive a verification code.
6	Optional: Tap the Cancel button to stop the verification process.
7	Tap the Next button.
8	Check your email or phone for the verification code.
9	Tap and enter the Verification Code in the Verification Code field.
10	Optional: Tap the Request New Code hyperlink to send a new code.
11	Optional: Tap the Cancel button to cancel the external verification process.
12	Tap the Next button to continue.
13	Use one of the following methods to locate the name of your external financial institution : <ul style="list-style-type: none">• Tap the Search for an account field and enter the name of the external financial institution.• Tap the corresponding financial institution tile. Scroll to see additional financial institutions.
14	To narrow your results, use the Sort by filter icon to arrange the tiles in one of three ways: <ul style="list-style-type: none">• Popularity• Name (A-Z)• Name (Z-A)
15	Tap the arrow on the right of the tile of the financial institution.
16	Optional: Tap the Learn More hyperlink for a visual showing the location of your Routing and Account Number on a check.



External Accounts Transfer Step-by-Step continued

Use the following steps to set up an external transfer.

Step	Action
17	Tap and enter the following information in the corresponding fields: <ul style="list-style-type: none">• Routing Number• (Optional) Account Nickname• Account Number
18	Scroll to tap and reenter the account number in the Confirm Account Number field.
19	Tap and select the Checking or Savings radio button (circle icon).
20	Optional: Tap the Cancel button to cancel the external transfer.
21	Tap the Connect button. The Request Accepted confirmation displays at the top of the screen.
22	Optional: Tap the Make a New Transfer button to start a new transfer.
23	Optional: Tap the Add Another Account button to add another account.
24	Monitor your external bank account for two micro-deposits sent for verification.
25	After both deposits have been made, tap the Transfer menu at the bottom of the screen.
26	Tap the Manage External Accounts hyperlink.
27	Tap the arrow on the record of the External Account shown in an Account Pending status.
28	Optional: Tap the Edit (✎) icon to update the Account Nickname .
29	Optional: Tap the Delete (🗑️) icon to delete the external account.
30	Tap the Verify Account button.
31	Review the external account selected for the transfer and review your recent transactions. Locate the two micro-deposit amounts and tap to enter each into the fields provided. <ul style="list-style-type: none">• Deposit Amount 1• Deposit Amount 2
32	Optional: Tap the Cancel button to stop the Trial Deposit Verification process.
33	Tap the Verify button.
34	The record for the External Account updates to show Active (a green checkmark). A verification message appears at the bottom of the screen, confirming the External Account was added.