



Mobile External Account Transfers

External Account Transfers allows you to securely move money between your Credit Union 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 | Tap to select the Verification Method (Text, Voice, or Email) using the drop-down arrow. |
| 4 | Tap and enter either a 10-digit Phone Number or an Email Address using the drop-down arrow to receive a verification code. |
| 5 | Tap the Next button. |
| 6 | Optional: Tap the Cancel button to stop the verification process. |
| 7 | Check your email or phone for the verification code. |
| 8 | If prompted to review a disclosure, click Accept & Continue to continue. If not, simply continue. |
| 9 | Tap and enter the Verification Code in the Verification Code field. |
| 10 | Tap the Next button. |
| 11 | Optional: Tap the Cancel button to stop the external transfer setup request. |
| 12 | Tap the Input Manually button at the bottom of the screen. |
| 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. Optional: 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 | 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 |
|------|--|
| 16 | Tap and enter the following information in the corresponding fields: <ul style="list-style-type: none">• Routing Number• (Optional) Account Nickname• Account Number |
| 17 | Scroll to tap and reenter the account number in the Confirm Account Number field. |
| 18 | Tap and select the Checking or Savings radio button (circle icon). |
| 19 | Tap the Connect button. |
| 20 | Optional: Tap the Cancel button to stop the external transfer setup request. |
| 21 | The Request Accepted confirmation appears 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 that will be 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 at the bottom of the screen. |
| 27 | Tap the record of the External Account shown in an Account Pending status. |
| 28 | Tap the Verify Account button. |
| 29 | Optional: Tap the Edit (✎) icon to update the Account Nickname . |
| 30 | Access the external account you want to transfer to and review your recent transactions. Locate the two micro-deposit amounts, then enter each amount into the corresponding fields provided. <ul style="list-style-type: none">• Deposit Amount 1• Deposit Amount 2 |
| 31 | Tap the Verify button. |
| 32 | Optional: Tap the Cancel button to stop the Trial Deposit Verification . |
| 33 | The record for the External Account will update to show Active , indicated by a green checkmark. |
| 34 | A verification message appears at the bottom of the screen, confirming the External Account was added. |