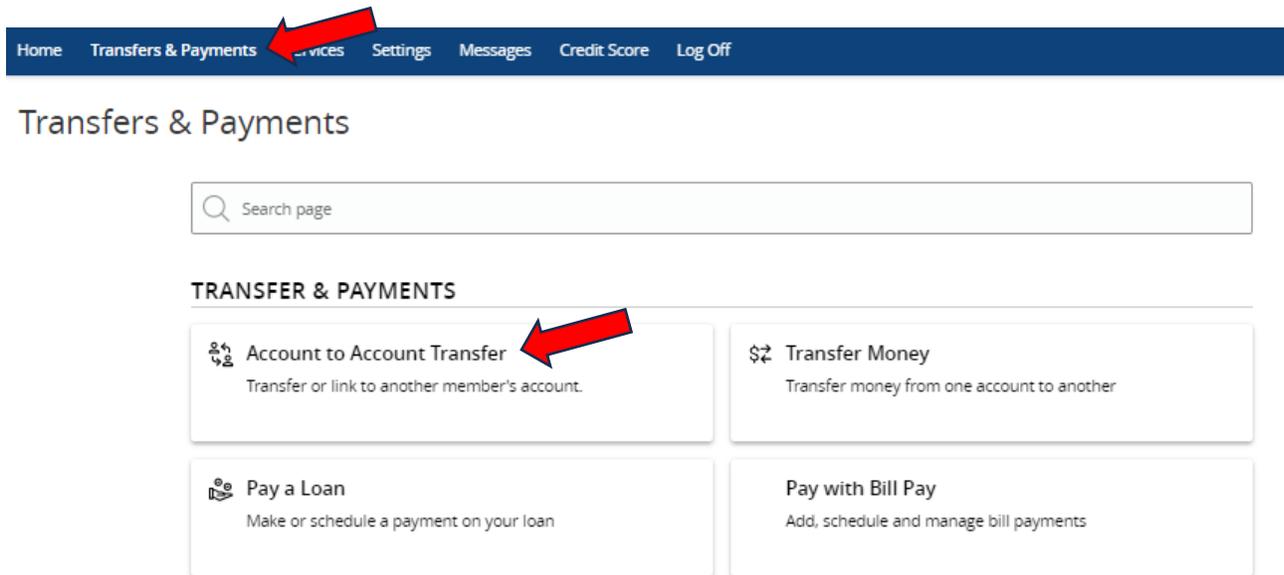


If you are planning on transferring money to another account within the credit union on a recurring basis, it is best to set up a transfer link. After the initial linking process, we also recommend that you immediately give the account a nickname. Nicknames help you differentiate similar account types such as Standard Checking 0080 or Standard Savings 0000. If you choose not to give the account a nickname, multiple linked accounts can appear with the exact same name (e.g. Standard Checking 0080) and will not have the overarching account number next to them.

**Step 1: Navigate to Link an Account**

- On the home screen, go to the menu and choose Transfers & Payments. Then choose the tile for Account to Account Transfer. Click the button for Link Account



**Step 2: Enter Account Information**

- Once on the page, enter the account number, Share ID/Loan ID, and the first 3 letters of the member’s last name in the indicated fields. Typical IDs are 0000 for savings, 0080 for checking, and 1000 for auto loans. Be sure to check with the account owner about which Share ID/Loan ID you need to enter, as they can vary.

**Link An Account**

Enter the information below to link the receiving member's account to your Online Banking login.

Enter recipient member information

Member Number

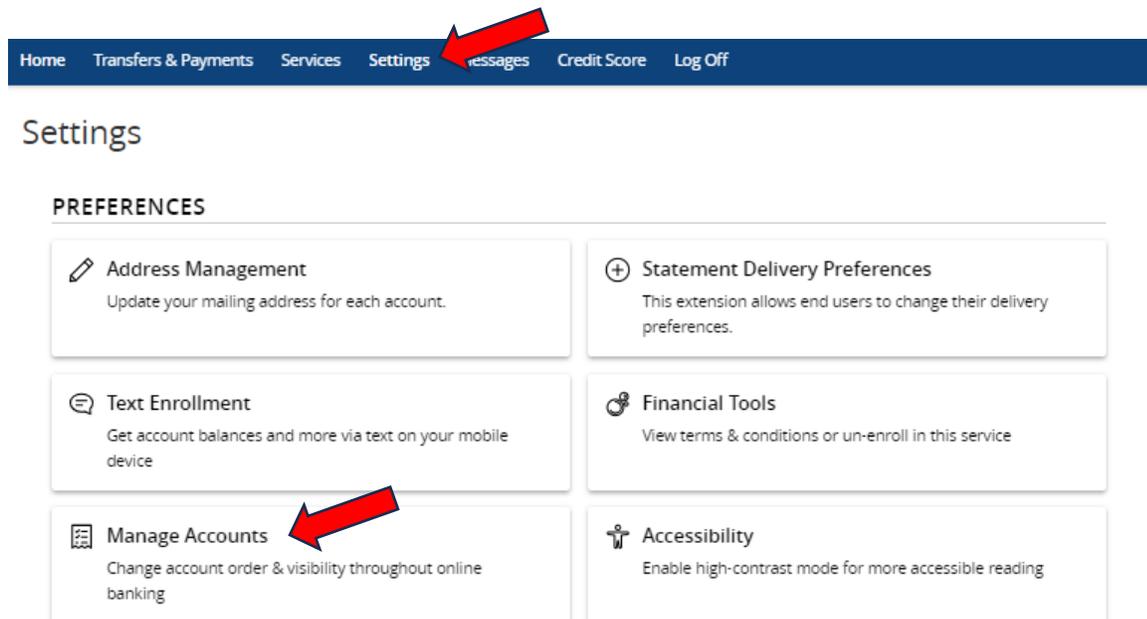
ShareID/LoanID

First 3 characters of Last Name

*(continued on next page)*

### Step 3: Nickname the Account

- Go to the menu and choose Settings. Then choose the Manage Account Tile.



- You will see this new linked account at the bottom of your account list under Hidden Accounts. Click on the account to expand the details. Then click the little pencil next to the account nickname. Type the nickname you want. If it doesn't appear to save right away, you may need to refresh the page.

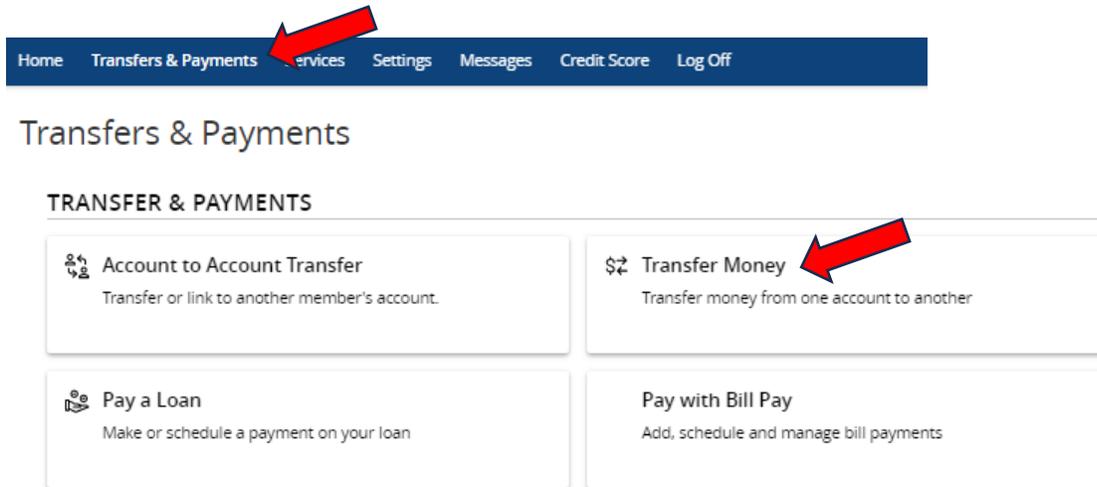
### Hidden Accounts



(continued on next page)

**Step 4: View the Account in the Transfer Portal (optional)**

- Once accounts are linked, the account is available for transfers. To do so, go to the menu and choose Transfers & Payments. Then choose the Transfer Money Tile.



- In the To Account field, you can now see the checking account you just set up and nicknamed. If you didn't nickname the account, it would still show as Standard Checking 0080, but this can be difficult to track if you have multiple 0080 account types linked.

Funds Transfer

