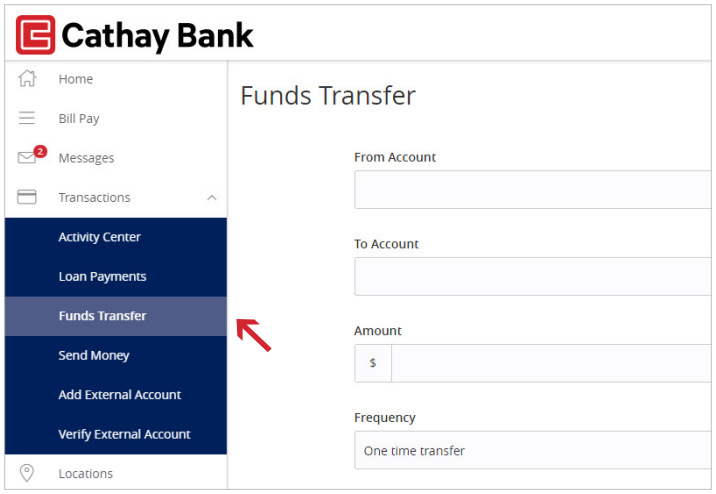
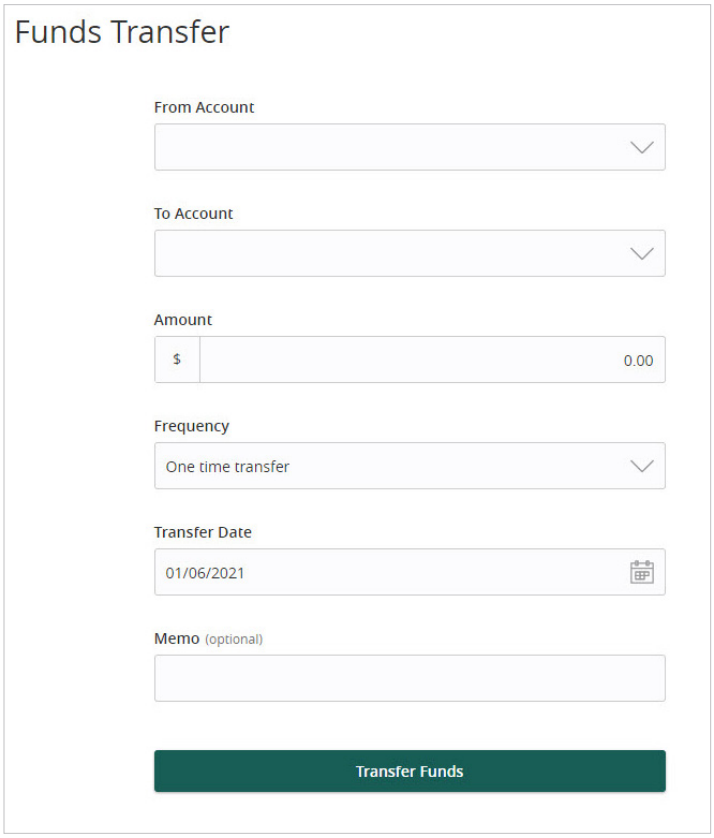
Funds transfers

1. Select Transactions from the left-hand navigation menu and then select Funds Transfer.



2. Select a From account.
3. Select a To account. You can enter an account at a different financial institution in either field if you have setup one of those accounts.
4. Enter a dollar amount.
5. Select Frequency and choose desired recurrence if you want this transfer to happen multiple times.
6. Enter Transfer Date for a one-time transaction. Enter a Start Date and Repeat Duration for a recurring transaction.
7. Enter a Memo for the transaction (optional).
8. Select Transfer Funds.



Note: The date selected is the date you want the transfer to be processed, not necessarily the date the funds will become available. If you select an account at another financial institution, that financial institution may charge an additional processing fee.