

TransferNow[®]

Setup and Configure TransferNow in Virtual Branch Next

1. Sign into Virtual Branch Next
2. Select Transfers

The screenshot displays the MyFinancial Virtual Branch Next interface. At the top right, there are links for Messages, Mobile, Chat, Settings, and Log Out. The MyFinancial logo is on the left. A navigation bar contains icons and labels for Accounts, Transfers, Pay Bills, My Cards, and Trends. The 'Transfers' icon and label are circled in red, and a green callout box labeled 'Step 1' points to it. Below the navigation bar, a welcome message reads: 'Welcome, George Washington Last logged in Jan 11, 2024 2:00 PM Eastern Time Zone'. The main content area is titled 'Accounts' and includes a '+ New Account' button, 'Transfer Money', 'eNotices', 'Create Alert', and 'Online Statements' links. A 'Favorite Accounts' section shows a table with columns for account name, available balance, and current balance. A 'Recent Transactions' section is partially visible with a dropdown menu.

| Favorite Accounts | |
|---------------------|------------|
| *1234=00 (Checking) | |
| Available | \$5,547.55 |
| Current | \$5,547.55 |

| Recent Transactions | |
|---------------------|--------------------------|
| *1234=00 (Checking) | View All |

TransferNow[®]

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1. Select "External Account Transfers"

The screenshot displays the MyFinancial user interface. At the top, the MyFinancial logo is on the left, and navigation tabs for 'Accounts', 'Transfers', 'Pay Bills', 'My Cards', and 'Trends' are on the right. The 'Transfers' tab is active. Below the navigation, there are two main sections: 'Transfer Money' and 'Services'. The 'Transfer Money' section contains three input fields: 'From:' with a dropdown menu showing 'Select an Account', 'To:' with a dropdown menu showing 'Select an Account' and a 'Custom recipient ?' link, and 'Amount:' with a text input field containing '\$0.00'. The 'Services' section contains four options: 'External Account Transfers', 'ACH Transfer In', 'ACH Transfer Out', and 'ACH Stop Payment'. The 'External Account Transfers' option is circled in red. A green arrow points from this option to a green-bordered box labeled 'step 2'.

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Create Transfers

When choosing the To: or From: account, select the "Add Account" link to add an external account.

Begin by selecting the account type. Enter the routing and account number. Select "Add."

Exit External Account Transfer

External Account Transfer

Transfer Funds | Activity | Preferences | Help

Create Transfer

Savings is easy when it's automatic Hide Tip
Saving for a big trip, a new home or just a rainy day is just a few clicks away, just select "Make Recurring" and you are set to go and grow.

To or from my other accounts
 To my recipient's account

From
Select From Account

To
Select To Account

[Add account](#)

Amount (\$)
\$ [View Limits](#)

Send
01/12/2024

Frequency
One-time transfer

Delivery
Select a **From** and **To** account to see delivery speeds

Memo to self (optional)
(50 characters remaining)
[Transfer Disclaimer](#)

[Review](#)

Step 3

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Adding External Accounts

Enter Account Information for the External Account and click Next.

Information includes Account Type, a nickname you want to use for that account to identify it easily, the Routing Number and Account Number which you will need to re-enter for confirmation purposes.

External Account Transfer

Transfer Funds Activity Preferences Help

Create Transfer

Savings is easy when it's automatic
Saving for a big trip, a new home or just a rainy day?
Recurring* and you are set to go and grow.

To or from my other accounts
 To my recipient's account

From
Select From Account

To
Select To Account

Amount (\$) \$ View Limits

Send 01/25/2024

Frequency One-time transfer

Delivery

Select a From and To account to see delivery speeds

Memo to self (optional)

(50 characters remaining)

Transfer Disclaimer

Review

Add External Account

We'll instantly make two small deposits to the bank account for your debit card so you can verify it right away.

Account Type
Please Select

Account Nickname (Optional)

FOR 123456789 1234567890
Routing Number Account Number

Routing Number
Enter bank's routing num

Account Number
Enter bank's account numbe

Re-enter Account Number
Re-enter bank's account num

Cancel Next

Legal: By clicking "Next" you understand that we may verify your external account identity using commercially-available databases containing information from public records, other financial institutions and consumer reporting agencies.

Step 4

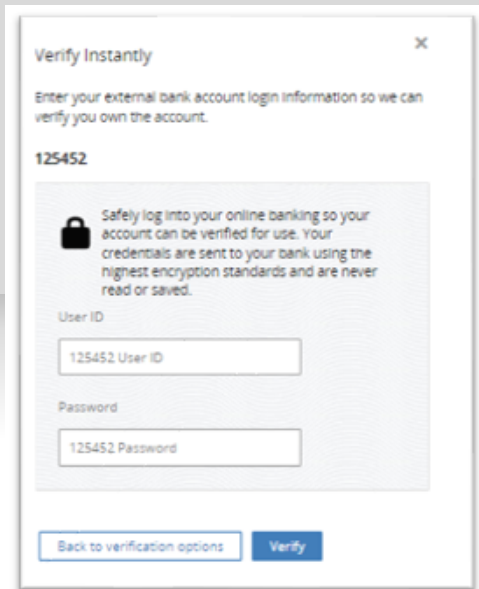
TransferNow[®]

Account Verification Options

Select "Verify Instantly" or "Verify with bank deposits"

Verify Instantly if you know your credentials for online banking at the other institution.


To verify by bank deposit, read and review the three-step process. Select "Send me two deposits" to initiate the trial deposit.



Verify Instantly [Close]

Enter your external bank account login information so we can verify you own the account.

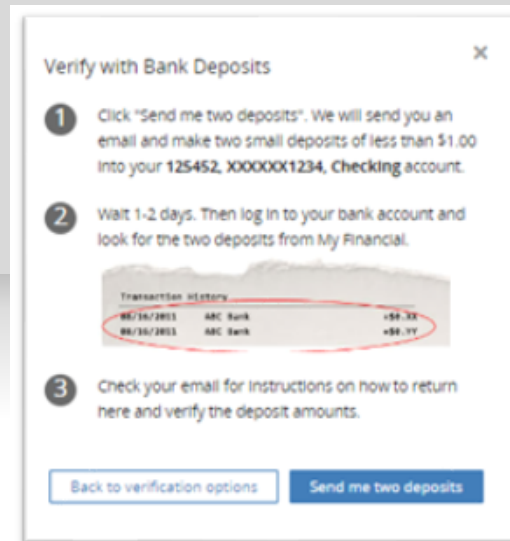
125452

 Safely log into your online banking so your account can be verified for use. Your credentials are sent to your bank using the highest encryption standards and are never read or saved.

User ID
125452 User ID

Password
125452 Password

[Back to verification options](#) [Verify](#)

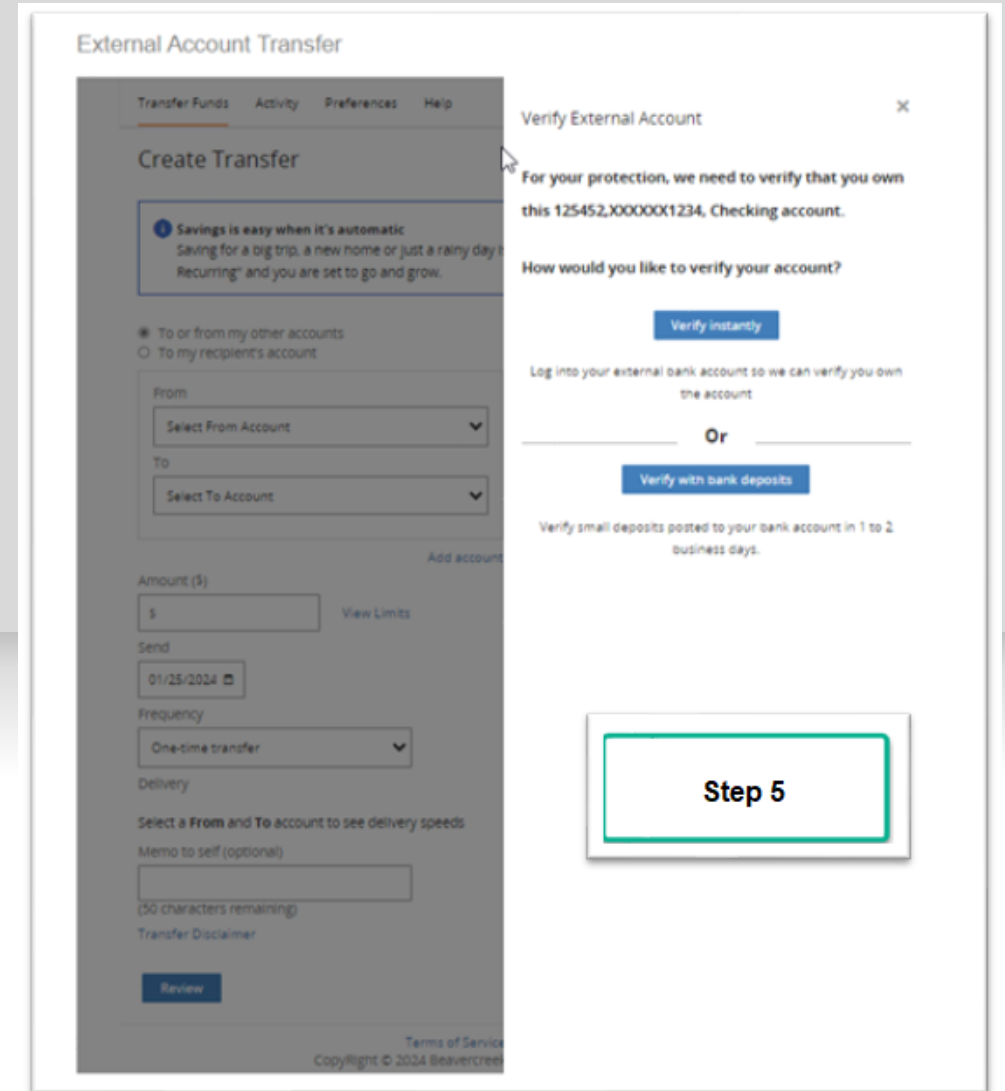


Verify with Bank Deposits [Close]

- 1 Click "Send me two deposits". We will send you an email and make two small deposits of less than \$1.00 into your **125452, XXXXXX1234, Checking** account.
- 2 Wait 1-2 days. Then log in to your bank account and look for the two deposits from My Financial.
- 3 Check your email for instructions on how to return here and verify the deposit amounts.

[Back to verification options](#) [Send me two deposits](#)

| Transaction History | | | |
|---------------------|----------|--|--------|
| 08/16/2013 | ABC Bank | | +99.99 |
| 08/16/2013 | ABC Bank | | +99.99 |



External Account Transfer [Close]

Transfer Funds Activity Preferences Help

Create Transfer

1 Savings is easy when it's automatic. Saving for a big trip, a new home or just a rainy day? Recurring and you are set to go and grow.

To or from my other accounts
 To my recipient's account

From: Select From Account [v]
To: Select To Account [v]

Amount (\$): [input] View Limits
Send: 01/25/2024 [calendar]
Frequency: One-time transfer [v]
Delivery: [v]
Select a From and To account to see delivery speeds
Memo to self (optional): [input]
(50 characters remaining)
Transfer Disclaimer

[Review](#)

Terms of Service
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Verify External Account [Close]

For your protection, we need to verify that you own this **125452,XXXXXX1234, Checking** account.

How would you like to verify your account?

[Verify Instantly](#)

Log into your external bank account so we can verify you own the account

Or

[Verify with bank deposits](#)

Verify small deposits posted to your bank account in 1 to 2 business days.

Step 5