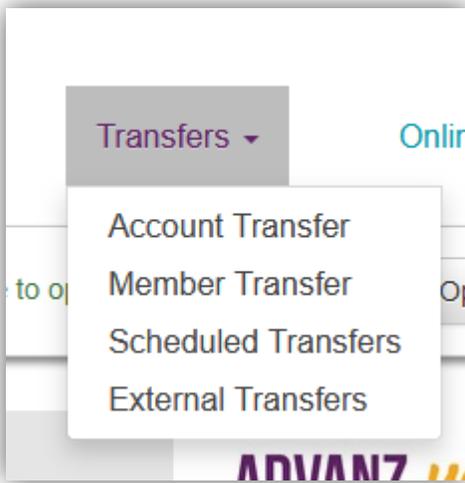


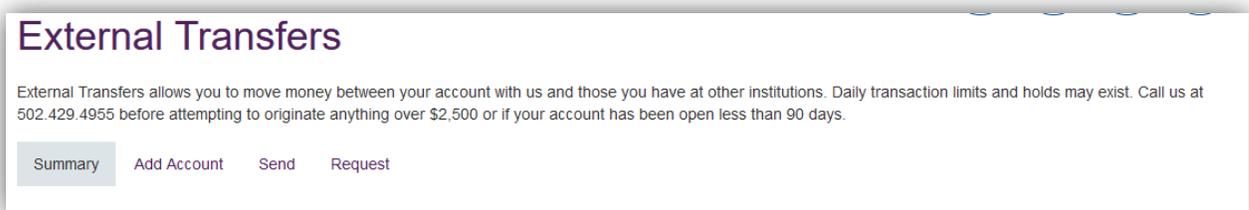


## EXTERNAL TRANSFERS

Log into your Online Banking account through the Advanz CU website. Click the **Transfers** tab in the main navigation and select **External Transfers**.



You will then see the following:



Select **Add Account**. Note: this is only for adding an account at a financial institution other than Advanz CU.



# Add Account

Transfer money to or from another financial institution.

Summary

Add Account

## Link a Bank or Credit Union Account

It's easy to link to another account at any financial institution.

What is Your Account Type?

Where is the External Account Held?

You can search using the financial institution's name, phone number, or Routing.

Find Institution

Please enter your Account Number and Account Name

You can change the account name to be anything you like, or use the default.

Cancel

Continue



Once you have completed this step and selected **Continue**, three small deposits will be made into your account at the other financial institution within one to two business days. To verify those amounts, log into the account at the other financial institution (the one you just added), make a note of the three amounts deposited, and log back into your account on the Advanz website. Click **Transfers**, then **External Transfers**, then **Verify** and enter the three deposit amounts. Once you have entered the amounts you are ready to set up transfers between Advanz and your other Financial Institution.

\*If you would like to withdraw money from Advanz and send it to another financial institution for deposit, then click on the Send option (Sending money out).

\*If you would like to receive money into your Advanz account from your other Financial Institution, then click on the Request option (Money coming in).

## External Transfers

External Transfers allows you to move money between your account with us and those you have at other institutions. Daily transaction limits and holds may exist. Call us at 502.429.4955 before attempting to originate anything over \$2,500 or if your account has been open less than 90 days.

[Summary](#) [Add Account](#) [Send](#) [Request](#)

You may only send or receive \$2,500 per day.

Under the **Send** or **Request** tabs, you will select where you want the money to come from. You may need to click the arrow to make a selection other than the default. For example, if you have multiple financial institutions added, it will default to one; click the arrow to select another.

Then, select where you want the money to go to. For example, if you want to make a loan payment but the default set is S-1, you will need to click the arrow to select the loan you wish to pay.



Next, enter the amount you want to transfer and the frequency (How/when the money should transfer).

\*Frequency: Annually, Biweekly, Daily, Monthly, Once, Quarterly, Semi-Annually, Semi-Monthly, and Weekly.

Then select the date on which you want this transaction to transfer.

\*The start date will default to the next day automatically. However, whatever day is selected the funds will be processed the previous day on the Advanz account so that the funds can be posted to the other financial institution on the selected day. If you want to send money (withdraw from Advanz) to another financial institution on Friday, then the money will be withdrawn Thursday afternoon. Saturday can be selected which would result in the withdraw posting Friday afternoon.

Once you have completed all the information, click **Submit**.

Review the information to be sure you have entered the information correctly then click **Confirm**.

You will then see:

A white rectangular box with a thin grey border and a subtle drop shadow. It contains the text "Transfer Submitted" in a large, bold, green font. Below it, in a smaller, dark grey font, is the message: "Your transfer has been submitted successfully. Please print this page for your records."/>

**Transfer Submitted**

Your transfer has been submitted successfully. Please print this page for your records.

If you click **Summary** you will see the other Financial Institution information that you have linked and the Transfers that you have set up to transfer and on what dates.

A white rectangular box with a thin grey border and a subtle drop shadow. It has a header "External Transfers" in a purple font. Below the header is a paragraph of text in a small, dark grey font. At the bottom, there is a horizontal menu with four items: "Summary", "Add Account", "Send", and "Request". The "Summary" item is highlighted with a grey background.

**External Transfers**

External Transfers allows you to move money between your account with us and those you have at other institutions. Daily transaction limits and holds may exist. Call us at 502.429.4955 before attempting to originate anything over \$5,000 or if your account has been open less than 90 days.

Summary Add Account Send Request