



Setting Up an External Transfer Guide


Adding an External Account for Bank-to-Bank Transfer

Bank to Bank Transfer allows you to send and receive money to/from an account you are an owner of at another institution.


This option is not for sending money to another person at another institution, see Bill Pay/Pay a Person for that option.


1. From the menu select Account Settings from the drop-down menu next to your name.




 Dashboard

 Messages

 Accounts

 Transfers

 Remote deposits


 Bill pay


 Support


KT

xxx-xxx-xxxx



 Add an account

 Personal settings

 Account settings

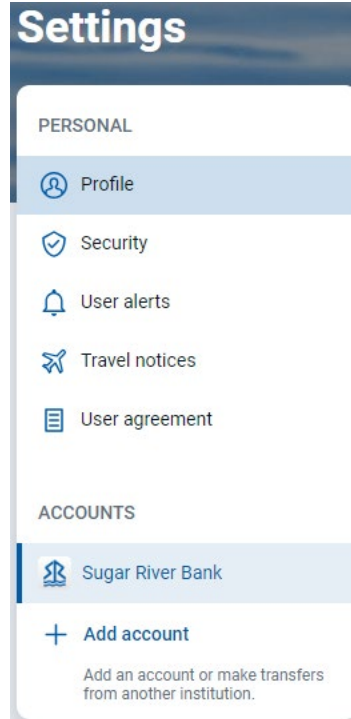
 Sign out

KT

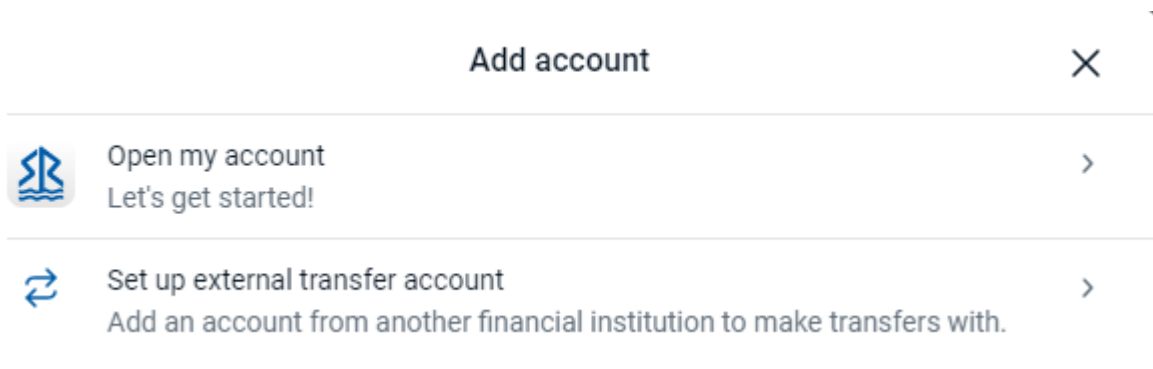
xxx-xxx-xxxx



2. Select +Add Account




3. Select the Set up external transfer account.



- For an added level of security, you must enter your credentials again.

×



Sugar
River
Bank
Est. 1895

Confirm your credentials to continue

Password _____

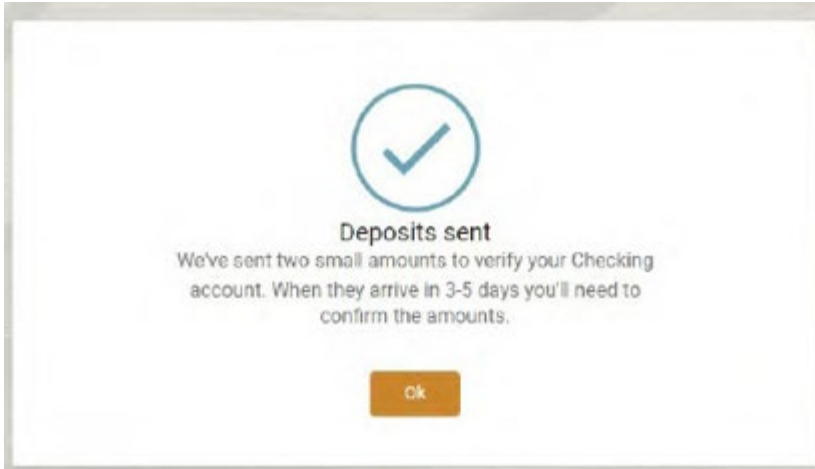
Confirm password

- Enter the required information. If the account type is not correct, the micro-deposits will not be sent. Select Submit.

< **Add external account**

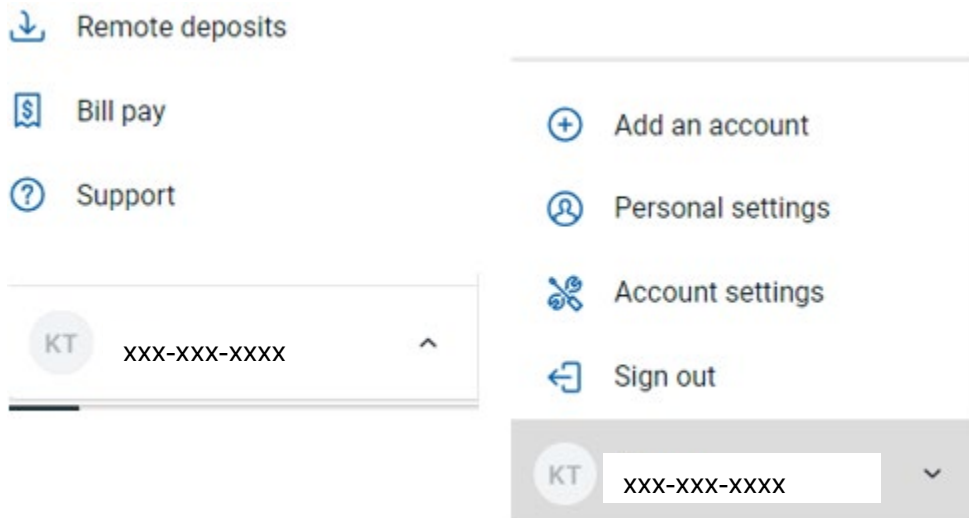
Account name	<input type="text" value="Enter"/>
Routing no. ⓘ	<input type="text" value="Enter"/>
Account no. ⓘ	<input type="text" value="Enter"/>
Account type	Select >

Submit



- Two small credits less than \$1.00 will be sent from a Sugar River Bank account, (not yours), as well as **one** debit for the total of the two credits. Once you see these deposits in your account at the other bank, return to the same place where you set up the account.

Menu>Your Name>Account Settings>+Add Account



- This time, when you select Set up external transfer account, it will open to the account you set up and be ready for you to enter the two credit amounts. You are not entering the debit amount that is the sum of the two credits.

Add account



Open my account
Let's get started!



Set up external transfer account
Add an account from another financial institution to make transfers with.



TruStone Financial

Routing #	Account #	Type
123456789	09876541234	Savings

1 We've sent two small deposits to verify your account. When they arrive in 3-5 days confirm the amounts below.

2 \$.00 \$.00

3 Confirm

TruStone Financial

Routing #	Account #	Type
123456789	09876541234	Savings

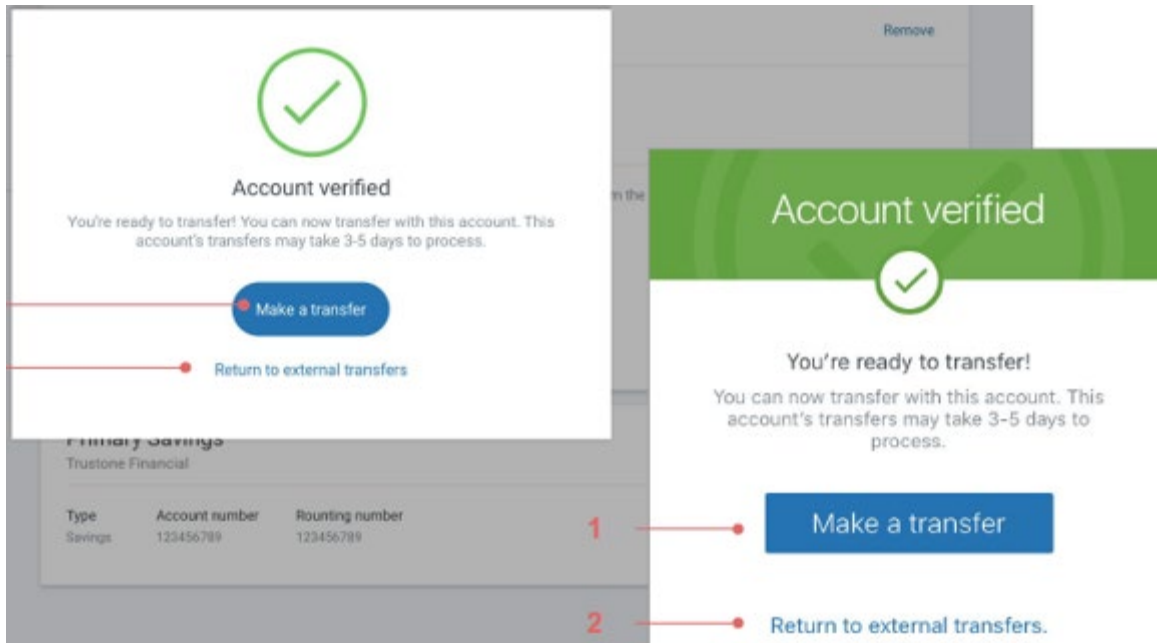
Account updated

Details of your account have been updated.

Close

4

Confirm



- You are now ready to transfer or return to the main menu. The next time you are on the main menu, you can access this account right from the Transfers section. External transfers are capped at \$2,500 per transaction and \$2,500 per day. If funds are available and you require a temporary increase, please contact us during regular business hours.

