

Classic Transfer Step 1: Click the **Transfer Widget** in the blue widgets menu on the left of your screen.

The screenshot shows the 'Dashboard' page with a left-hand navigation menu. The menu items are: DASHBOARD, ACCOUNTS, TRANSFERS, BILL PAY, POINTS FOR PERKS, and MORE... The 'TRANSFERS' menu item is highlighted with a blue box and a callout bubble that says 'Click Here Make a Transfer'. The main content area shows 'My Accounts' with a list of accounts and their balances: Savings (\$2,312.87), S0000 PRIMARY SH (\$1,557.87), CHRISTMAS CLUB (\$755.00), Checking (\$80.42), S0020 CHECKING (\$80.42), Loans (\$8.88), and 2013 FORD EDGE LIMITED (\$8.88). There are also 'Financial News' and 'Last 7 days' sections.

Classic Transfer Step 2: Click **“Classic”** in the transfer menu bar.

The screenshot shows the 'Transfers' page with a navigation bar containing 'Quick', 'Classic', 'Scheduled', and 'History'. The 'Classic' option is selected and highlighted with a blue box and a callout bubble that says 'Click Here to Make a Classic Transfer'. Below the navigation bar, there are fields for 'Today' (September 26), 'Occurs' (Once), and 'Reason' (None). The main content area is divided into three columns: 'From', 'Amount', and 'To'. The 'From' column lists accounts with their balances: S0000 PRIMARY SH (\$1,472.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$160.42), and L0010 VISA (\$387.02). The 'Amount' column shows a grid of amount buttons: \$20, \$40, \$60, \$80, \$100, \$200, \$300, \$400, \$500, \$1000, \$2000, \$3000, \$4000, and \$5000. The 'To' column lists destination accounts: S0000 PRIMARY SH (\$1,477.87), CHRISTMAS CLUB (\$755.00), S0020 CHECKING (\$160.42), Saved Account 1 (04-0020), Saved Account 2 (44-0020), and 2013 FORD EDGE LIMITED.

Classic Transfer Step 3: Use the **first dropdown menu** to select the account/share in which you wish to transfer funds **FROM**.

Transfers [Dashboard] [Accounts] [Transfers] [Bill Pay] [Points for Perks] [More...]

Quick **Classic** Scheduled History

Transfer Details

From Account * [Dropdown Menu]

- S0000 PRIMARY SH (89-0000) \$1,472.87
- CHRISTMAS CLUB (89-0001) \$755.00
- S0020 CHECKING (89-0020) \$160.42
- L0010 VISA (89-0010) \$387.02

To Account * [Empty]

Amount * [Empty]

Date [Empty]

Frequency [One Time]

Reason [Empty]

Transfer Confirmation

From Account None Selected

To Account None Selected

Amount \$0.00

Occurs One Time

On Today

Reason [Empty]

Confirm Transfer

Classic Transfer Step 4: Use the **second dropdown menu** to select the account/share in which you wish to transfer funds **TO**.

Transfers [Dashboard] [Accounts] [Transfers] [Bill Pay] [Points for Perks] [More...]

Quick **Classic** Scheduled History

Transfer Details

From Account * S0000 PRIMARY SH

To Account * [Dropdown Menu]

+ Add Account

Amount * 0.00

Date 09/26/2016

Frequency [One Time]

Reason [Empty]

Transfer Confirmation

From Account S0000 PRIMARY SH (89-0000) \$1,472.87

To Account None Selected

Amount \$0.00

Occurs One Time

On Today

Reason [Empty]

Confirm Transfer

Classic Transfer Step 5: Type in the amount you wish to transfer.

Transfers

Quick **Classic** Scheduled History

Transfer Details

From Account * S0000 PRIMARY SH

To Account * S0020 CHECKING

+ Add Account

Amount *

Date 09/26/2016

Frequency One Time

Reason

Transfer Confirmation

From Account S0000 PRIMARY SH 89-0000 \$1,472.87

To Account S0020 CHECKING 89-0020 \$160.42

Amount \$0.00

Occurs One Time

On Today

Reason

Confirm Transfer

Classic Transfer Step 6: Click the **calendar icon** to select the **Date** on which you want the transfer to occur. If you do not select a date, it will default to the current day.

Transfers

Quick **Classic** Scheduled History

Transfer Details

From Account * S0000 PRIMARY SH

To Account * S0020 CHECKING

+ Add Account

Amount *

Date 09/26/2016

Frequency One Time

Reason

Transfer Confirmation

From Account S0000 PRIMARY SH 89-0000 \$1,472.87

To Account S0020 CHECKING 89-0020 \$160.42

Amount \$20.00

Occurs One Time

On Today

Reason

Confirm Transfer

Classic Transfer Step 7: Use the **dropdown menu** to select the **Frequency** (how often) you would like the transfer to occur.

Transfers

Quick **Classic** Scheduled History

Transfer Details

From Account * S0000 PRIMARY SH

To Account * S0020 CHECKING

+ Add Account

Amount * 20.00

Date 09/26/2016

Frequency

- One Time
- One Time
- Daily
- Weekly
- Every 2 Weeks
- Semimonthly (1st and 15th)

Reason

Transfer Confirmation

From Account S0000 PRIMARY SH 89-0000 \$1,472.87

To Account S0020 CHECKING 89-0020 \$160.42

Amount \$20.00

On Today

Reason

Confirm Transfer

Classic Transfer Step 8 (optional): Type the **reason** for the transfer.

Transfers

Quick **Classic** Scheduled History

Transfer Details

From Account * S0000 PRIMARY SH

To Account * S0020 CHECKING

+ Add Account

Amount * 20.00

Date 09/26/2016

Frequency One Time

Reason

Transfer Confirmation

From Account S0000 PRIMARY SH 89-0000 \$1,472.87

To Account S0020 CHECKING 89-0020 \$160.42

Amount \$20.00

Occurs One Time

On Today

Reason

Confirm Transfer

Classic Transfer Step 9: Verify that your selections are correct in the **Transfer Confirmation** window to the right of your screen.

The screenshot shows the 'Transfers' interface with two main panels. The left panel, 'Transfer Details', contains the following information:

- From Account: S0000 PRIMARY SH
- To Account: S0020 CHECKING
- Amount: 20.00
- Date: 09/26/2016
- Frequency: One Time
- Reason: Lunch

The right panel, 'Transfer Confirmation', displays a summary of the transfer:

- From Account: S0000 PRIMARY SH (89-0000) with an available balance of \$1,472.87.
- To Account: S0020 CHECKING (89-0020) with a balance of \$160.42.
- Amount: \$20.00
- Occurs: One Time
- On: Today
- Reason: Lunch

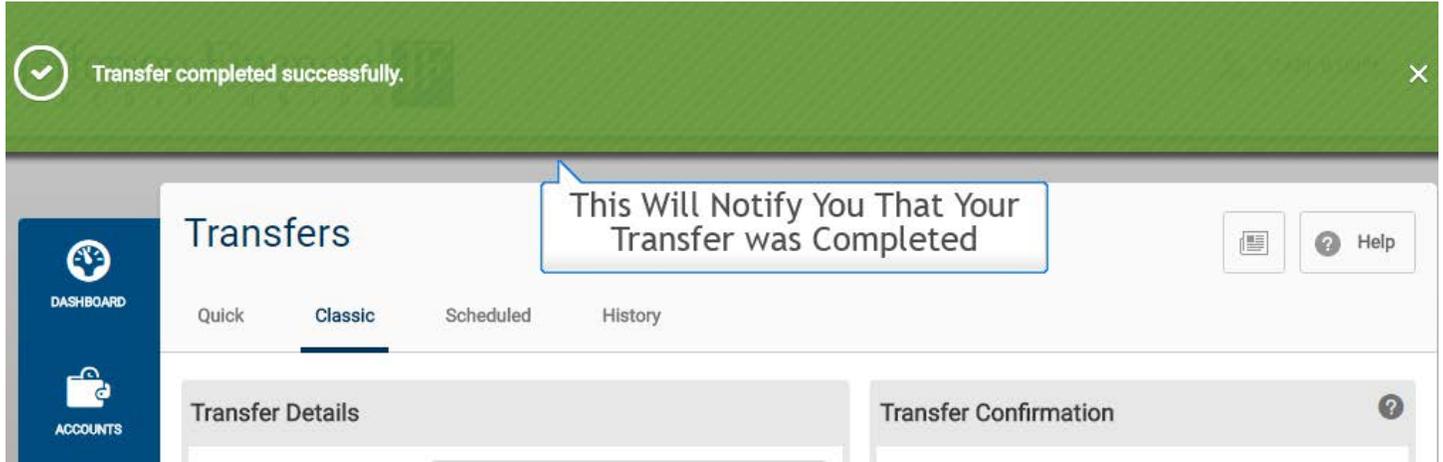
A blue box highlights the top of the 'Transfer Confirmation' panel with the text 'Verify your transaction is Correct.' and a blue arrow pointing down to the account information.

Classic Transfer Step 10: Click the blue **Confirm Transfer** button at the bottom right to complete the transfer.

This screenshot is identical to the previous one, but with a blue button labeled 'Confirm Transfer' at the bottom right of the 'Transfer Confirmation' panel. A blue box highlights this button with the text 'Select Confirm Transfer'.

At the bottom left of the interface, there is a small note: 'A available balance'.

Classic Transfer Final Step: When your transfer has successfully completed you will see a **green box** notifying you of such at the top of screen.



If you need additional assistance accessing your account for the first time, please contact us at **800.259.2471**.