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

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

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

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

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

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

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

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

Transfers

Quick   Classic   Scheduled   History   Help

Transfer Details

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

Verify your transcatioin is Correct.

Transfer Confirmation

From Account	S0000 PRIMARY SH
	89-0000 A $1,472.87
To Account	S0020 CHECKING
	89-0020 $160.42
Amount	$20.00
Occurs	One Time
On	Today
Reason	Lunch

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

Transfers

Quick   Classic   Scheduled   History   Help

Transfer Details

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

Transfer Confirmation

From Account	S0000 PRIMARY SH
	89-0000 A $1,472.87
To Account	S0020 CHECKING
	89-0020 $160.42
Amount	$20.00
Occurs	One Time
On	Today
Reason	Lunch

Confirm Transfer

Select Confirm Transfer

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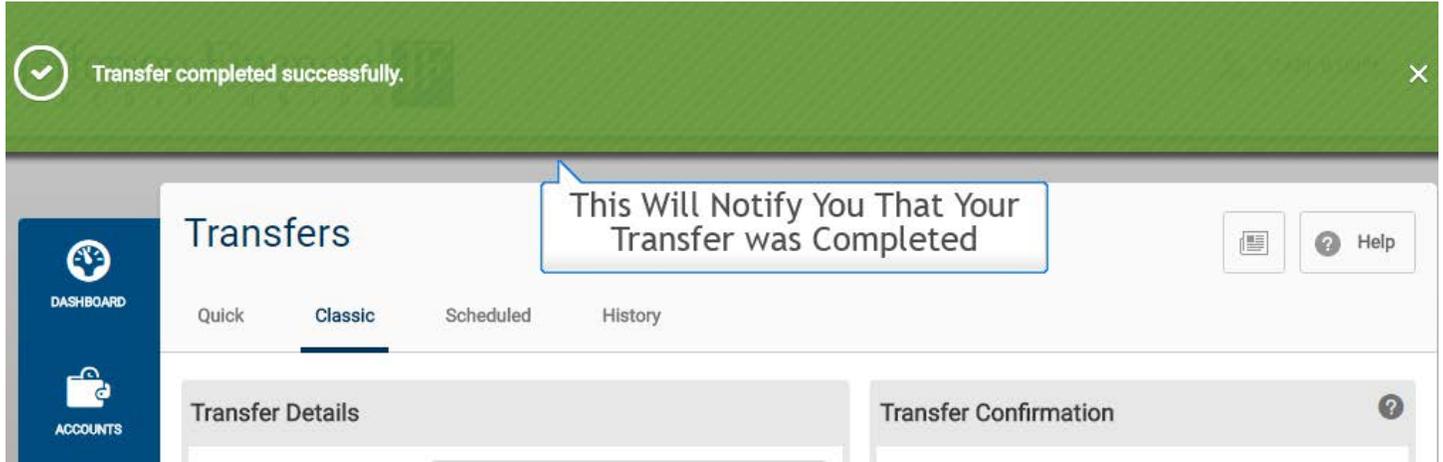
If you need additional assistance accessing your account for the first time, please contact us at **800.259.2471**.