#### External Account Setup Step 1: Click the Drop down Arrow in the

top right hand corner next to your name.

8	Iefferso	n Financial 🌇 😽 🥵	njoy exclusive savings e	very day. Sprint	
5	FEDERAL		\$2 billion on discounts from	partners! Sturbotax. Aember	Ľ
	_			Click the Drop Down Arrow	N
	DASHROARD	Dashboard			•
		My Accounts	0	Financial News	
	ACCOUNTS	Savings		Loan Details and Payments Loan Details and Payments VIDEO	
	¢	SAVINGS		Loan Details and Payments PDF October 24, 2016	
		Checking		Classic and Quick Transfers Quick and Classic Transfers VIDEO Classic Transfers PDF Quick Transfers PDF	
	BILL PAY	CHECKING	A	October 24, 2016	
	POINTS FOR PERKS	${f l}$ Joint Owner ${\ensuremath{ \mathscr{C}}}$ Shared Account ${\begin{tabular}{c} {\begin{tabular}{c} {\be$		Last <b>15</b> days	•
				- Etimes	·
	MORE	Budget Tracker for <b>June</b>			

### External Account Setup Step 2: Click Settings from the drop down

list.



## **External Account Setup Step 3**: Click the **Accounts** tab on the settings page.

J <u>efferso</u>	n Financial JF	MYCARDRULES <sup>TM</sup> MONITOR & PROTECT	A Member V
	Settings		Help
ACCOUNTS	Profile Security Profile Information	Themes Widgets Contact Notifications	Accounts Click the Accounts tab
TRANSFERS	Full Name Birth Date	01/09/1980	
BILL PAY	Nickname Profile Image	Member	Edit
	Time Zone	(UTC-06:00) Central Time (US & Canada)	Edit
●●● More	Recent Login Activity	Browser	

#### External Account Setup Step 4: Click the Link an External Account

button on the accounts page.

J <u>efferso</u> Federal	n Financial JF	Enjoy exclusive savings e Crebit UNION REWARDS Month S2 billion on discounts from p	every day.
DASHBOARD	Settings Profile Security	Themes Widgets Contact Notifi	ications Accounts
	Savings	Click Link an External A	CCOUNT button
TRANSFERS	CHRISTMAS Savings — 89-0001 SAVINGS	Joint Owner Joint Owner	Edit
POINTS FOR PERKS	Savings — 89-0000 SAVINGS Savings — 15-0000		Edit
●●● MORE	Checking . CHECKING	Joint Owner	Reorder Accounts

#### External Account Setup Step 5: Click External Transfer Account

selection. This will allow you to make transfers to and from this account.



**External Account Setup Step 6**: Read the **Transfer Disclosure** then check the **I Agree** box when finished.



**External Account Setup Step 7**: Click **Continue** to accept the Transfer Disclosures.



**External Account Setup Step 8**: Type in the **Routing Number** for the External Account.

J <u>efferson Financ</u>	Add Acco	Enjoy exclusive savings every day.	Q Member *
Settings	Account Type	Checking	
DASHEGARD Profile 5	Ser Routing Number	9 digits	ounts
	Account Number	Type in the Routing Numbe for the External Account	Link an External Account
	Confirm Account Number		Reorder Accounts
	S Nickname 2		Edit
	000	Course Course	Edit
		Cancel	Reorder Accounts
		L Joint Owner	Edit

**External Account Setup Step 9**: Type in the **Account Number** for the External Account.

Jefferso	n Financia		Enjoy exclusive savings e	very day.	Q
FEDERAL	CREDIT UNIO	Add Accou	unt at another bank	× IOP	
0	Settings	Account Type	Checking ~		
DASHBOARD	Profile Sec	Routing Number	082000109	Accounts	
ACCOUNTS					
		Account Number			
Ø TRANSFERS	Savings	Confirm Account Number	Type in the External A	ccount Numb	er leorder Accounts
BILL PAY	35	Nickname ?			
POINTS FOR PERKS	000		Cancel	21/0	
	c				
MORE					

External Account Setup Step 10: Re-type in the Account Number

for the External Account.

J <u>efferso</u> Federal	n Financia credit unio	Add Accor	Enjoy exclusive savings every day, unt at another bank	Sprint) Q Inbotax Member *
0	Settings	Account Type	Checking v	Hall E Heip
DASHBOARD	Profile Sec	Routing Number	082000109 REGIONS BANK	Accounts
TRANSFERS	Savings	Account Number	00000000	Reorder Accounts
BILL PAY	-00 )S -00	Nickname 7	Re-enter the External Acco	unt Number
POINTS FOR PERKS			Cancel Save	Edit
MORE	C ING		: Jaint Owner	Fieorder Accounts

# **External Account Setup Step 11**: Type in a **Nickname** for the External Account.

Tefform			Enjoy exclusive savings every	day.
FEDERAL	CREDIT UNIC	Add Accou	unt at another bank ×	100 L Member *
0	Settings	Account Type	Checking *	
DASHBOARD	Profile Sec	Routing Number	082000109	Accounts
			REGIONS BANK	Link an External Account
Accounts		Account Number	0000000	
TRANSFERS	Savings	Confirm Account Number	0000000	Reorder Accounts
_	тмА -00	Commin Account Number	000000	Edit
BILL PAY	)S -00	Nickname ?		Edit
<u>\$2</u>			Type in a nickname for the	e External Account
POINTS FOR PERKS	OCK			Edit
	c		Cancel	Reorder Accounts
MORE				

**External Account Setup Step 12**: Verify all the information is correct then check the Save.

Jefferson	Financia <sup>1</sup>	Add Accou	Enjoy exclusive savings every day int at another bank ×	Lucitation Member Y
	Settings	Account Type	Checking v	Hall The Heip
	Profile Sec	Routing Number	082000109 REGIONS BANK	Accounts
ACCOUNTS	Savinge	Account Number	0000000	Link an External Account
TRANSFERS	-001	Confirm Account Number	0000000	Edit
BILL PAY	) -00	Nickname ?	Other Account	Edit
POINTS FOR PERKS	000		Cancel Save	Edit
●●● MORE	ING	Click verify all	the <b>Save</b> button after you the information is correct	Edit

**External Account Setup Step 13**: **Read** the information on how to Confirm Your External Account then click the **OK**.

J <u>efferso</u> Federal	n Financial	Enjoy exclusive savings eve Calification Calification and today	ry day. o shop A Member ~
		Confirm Your External Account	
	Settings	As a security measure, you <b>cannot</b> transfer funds to or from this account until it has been confirmed.	THE THE
DASHBOARD	Profile Secur	1	Accounts
		We will send two (2) deposit transactions to this account.	
ACCOUNTS		It may take up to three business days to appear in the transaction history.	Link an External Account
¢	Savings	(2)	Reorder Accounts
TRANSFERS	MAS -0001	Go to <b>Settings</b> and click on the <b>Accounts</b> tab to confirm the external account.	Edit
BILL PAY	)s -0000	ок	Edit
	0000	<b>READ</b> the dialog box Click the <b>OK</b> button	Edit
PERKS			
			Reorder Accounts
MORE	ING	St Ugint Owner	Edit

External Account Setup Step 14: Once you have confirmed that the two deposits have been posted to your External Account, please Repeat Steps 1-3 (Drop down Arrow > Settings > Account Tab)

Note: The System takes up to **three business days** for the two deposits to post to your External Account

External Account Setup Step 15: Scroll to the bottom of the Account

tab to confirm your external account.

Jefferso	n Financial		ember v
FEDERAL	CREDIT UNION		
	Settings		<b>?</b> Help
DASHBOARD	Profile Security	Themes Widgets Contact Notifications Accounts	
ACCOUNTS		Scroll to the bottom of the Accounts tab	l Account
Ø	Savings	Reorder A	ccounts
	CHRISTMAS Savings — 89-0001	L Joint Owner	Edit
BILL PAY	SAVINGS Savings — 89-0000	u Joint Owner	Edit
POINTS FOR PERKS	SAVINGS Savings — 15-0000		Edit
•••	Checking	Reorder A	Accounts
MORE	MY CHECKING	Joint Owner	Edit

#### External Account Setup Step 16: Click the Confirm button.

PERKS			
	Checking		Reorder Accounts
MORE	MY CHECKING Checking — 89-0020	悲 Joint Owner	Edit
	CHECKING Checking — 79-0020	Shared Account	Edit
	Credit Card		
	ANTHONY VISA Credit Card — 15-0010	Shared Account	Edit
	ACH Accounts		
	Other Account ACH Accounts — ****0000	External PENDING Co	nfirm Edit Delete
		Click the <b>Confirm</b> button	7
	Home   Mobile	Routing Number 265474109 Equal Housing Opportunity	Federally Insured by NCUA NCUA
		2018 Jefferson Financial Credit Union. All Rights Reserved.	

#### External Account Setup Step 17: Type in the amount of both

deposits made to your external account.

J <u>efferso</u> Federal					Q Member Y
		Confirm Trial Dep	oosits		
0	Settings	As a security measure, w account #00000000 at F days for those transaction	ve sent two transactions of different amounts to REGIONS BANK. It may take up to three business ons to appear in your account.		O Help
	Profile Secur	We ask you to confirm th owner of this REGIONS E	ne transaction amounts to ensure you're the BANK account.	Accounts	
		First Deposit *		Link an Ext	ternal Account
	Savings	Second Deposit *		Reo	rder Accounts
	CHRISTMAS Savings — 89-0001		Cancel Confirm		Edit
	CARL SAVINGS Savings — 89-0000		L Joint Owner		Edit
					Edit
					rder Accounts
			L Joint Owner	Adobe Captivate	Edit

**External Account Setup Step 18**: Click the **Confirm** button to finalize the setup of your external account.

J <u>efferso</u> federal		Enjoy exclusive savings et Citak to starts aving today!	very day. to shop
		Confirm Trial Deposits	
0	Settings	As a security measure, we sent two transactions of different amounts to account #00000000 at REGIONS BANK. It may take up to three busines days for those transactions to appear in your account.	s
	Profile Secur	We ask you to confirm the transaction amounts to ensure you're the owner of this REGIONS BANK account.	Accounts
		First Deposit •	Link an External Account
	Savings	Second Deposit •	Reorder Accounts
	MAS -0001	Cancel	Edit
		Link Towner	
MORE	ING	Joint Owner	Edit

To make your first external transfer proceed to the transfer tab in the left navigation bar

For help making a transfer visit our Quick/Classic Transfer Guide

If you any additional assistance with your account, please contact us at **800.259.2471**.