1. Click **Transfers & Payments**, then the **Transfer Within Account**
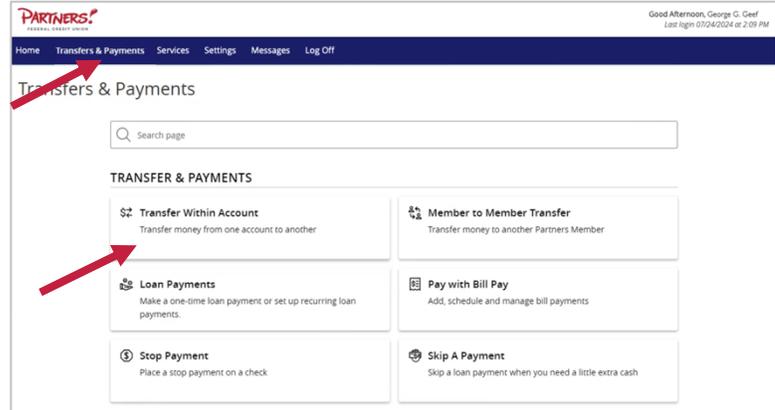
2. Select a **From** account.
3. Select a **To** account.
4. Enter a dollar amount.
5. Choose a **Frequency**.
6. Select a **Transfer Date** for the transaction.
7. Enter a **Memo** for the transaction. *(Optional)*
8. Click **Transfer Funds** to complete the transaction.

    NOTE: To set up a recurring transfer, follow the steps in the Recurring Transfers section.

Recurring Transfers

1. Follow steps 1 through 4 above.
2. In the **Frequency** field, select the desired frequency from the dropdown menu.

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1. Select the **Start Date**.
2. Select the desired **Repeat Duration**.
   a. Forever (Until I Cancel) *or*
   b. Until Date (Set an End Date)
3. Enter a **Memo** for the transaction. *(Optional)*
4. Click **Transfer Funds** to complete the transaction.

Frequency

1st of the month

Start Date

8/19/2024

ⓘ Transfers falling on a Sunday or banking holiday will be processed the following business day.

Repeat Duration

● Forever *(Until I Cancel)*

○ Until Date *(Set An End Date)*

Memo (optional)

Transfer Funds

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