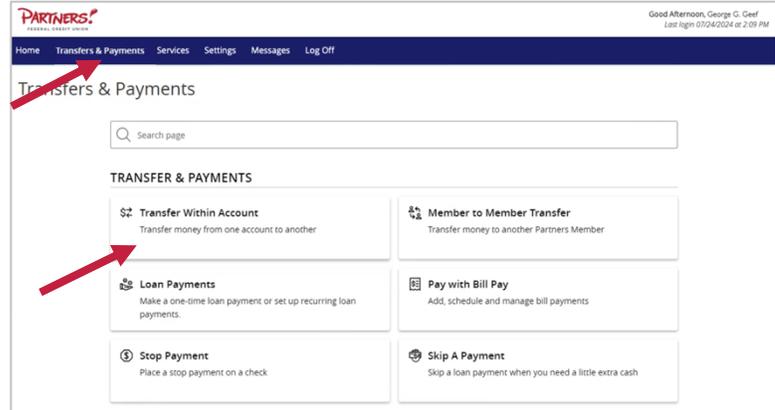


1. Click **Transfers & Payments**, then the **Transfer Within Account**



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.

The screenshot shows the 'Funds Transfer' form. It includes the following fields: 'From Account' (dropdown), 'To Account' (dropdown), 'Amount' (input field with a dollar sign and a value of 0.00), 'Frequency' (dropdown menu showing 'One time transfer'), 'Transfer Date' (input field with a calendar icon and a value of 8/19/2024), and 'Memo (optional)' (text input field). A blue 'Transfer Funds' button is at the bottom.

Recurring Transfers

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

The screenshot shows the 'Frequency' dropdown menu expanded. The selected option is '1st of the month'. Other visible options include 'Last day of the month', '1st & 15th of the month', '15th & last day of the month', 'Weekly', and 'Every other week'.

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