

MEMBER TO MEMBER TRANSFERS

Transfer to other members of CCU

✓ Once logged into your online/mobile banking, select the **"Member Transfer"** icon on the dashboard or access on the left-hand side of your screen

✓ Select **"New Member Transfer"**

✓ Enter the following information:

- ✓ First three letters of the member's name or the first three letters of the business name
 - ✓ Ex; John Smith > "Smi" or Colorado Credit Union > "Col"

The screenshot shows the 'Member Transfer' form with the following fields highlighted in yellow: Member name (with a sub-label 'First 3 letters of last name (or business name)'), Member #, Type (with a dropdown arrow), and Checking # (with a dropdown arrow). There is also a checkbox for 'Save for future use' and a 'Next' button at the bottom.

- ✓ The member's account number
- ✓ The type of sub account you are transferring into (savings, checking, or loan)
- ✓ The share ID that corresponds to the share type
- ✓ Check the box if you would like to save the account for future use, select **"Next"**

✓ Select the share you would like to transfer the funds from

✓ Select a frequency; how often you would like to make the transfer

✓ Select a date you would like to make the transfer

✓ Adding a memo is optional, select **"Next"**

✓ The next page will be an overview of the transfer information submitted, please verify the information before you **"Submit"**

✓ Once you've submitted, please select **"Done"** and it will redirect you back to the dashboard

The screenshot shows the second page of the 'Member Transfer' form. Fields highlighted in yellow include: From, Amount (\$ 10.00), Frequency (Once), and Date (Soonest available). It also shows 'Transferring to' (redacted), 'Edit Recipient', 'S0014 CHECKING \$73.16', and a memo field with 'Lunch 3/3/23'. A 'Next' button is at the bottom.