

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 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"**

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', and 'Checking #'. There is also a checkbox for 'Save for future use' and a 'Next' button at the bottom.

✓ 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 'Member Transfer' form with the following fields highlighted in yellow: 'From', 'Amount', 'Frequency', and 'Date'. It also shows 'Transferring to' (with a sub-label 'Edit Recipient'), 'S0014 CHECKING' (with a sub-label '\$73.16'), and a memo field with the text 'Lunch 3/3/23' and a note 'For immediate, one-time transfers only'. A 'Next' button is at the bottom.