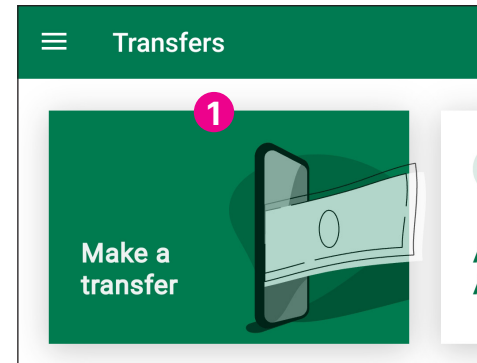


Transfers – Mobile App

Access *Transfers* in our mobile app lower menu to make a loan payment or move money to another account.

- 1 Tap on **Make a transfer**.
- 2 Enter the details of the transfer, including the accounts to use, the amount, the frequency, and the date when you'd like the money moved. (If you don't see the account you'd like to use, see **Adding Other Accounts** below.)
- 3 Tap **Review Transfer** to review your transfer. If everything looks correct, tap **Submit Transfer**.

For security reasons you may be asked to verify your identity.



Make a Transfer

Payment type
Current Amount Due \$0.00

When
One Time

Date
06-24-2022

Memo

Description (optional)
0 / 20

Learn more about our [Transfer policy](#) and [Limits](#)

Review transfer

Accounts Transfer/Pay Deposit Cards More

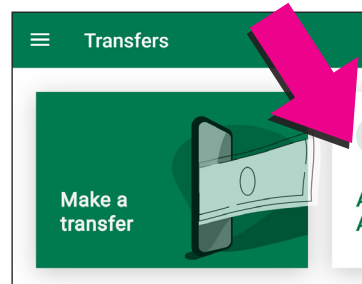
Adding Other Accounts

In the *Transfers* menu, swipe from *Make a transfer* to **Add an Account**.

- To add another Veridian account, you'll need the full account number and the account holder's last name.

The account holder can find their full account number:

- on their statements.
 - in online banking by clicking the eye icon.
 - in the mobile app under Account Details, then tapping the eye icon.
- You can add your accounts at other financial institutions by verifying your ownership in one of two ways:
 - Instantly, by signing in with the credentials you use to access online banking at that institution.
 - Within three days, using deposits to verify the account. You'll need the account number and routing number to set up the deposits.



Add account

Select an option below to add a new account

Internal account

Send money to another Veridian Credit Union member

We will send an email to the recipient notifying them of this connection.

External account

Add an account instantly

Sign in with the credentials you use for your external account.

Add an account manually

Enter your account number and routing number. Verification can take up to 3 days.

Transfers

For security reasons you may be asked to verify your identity.

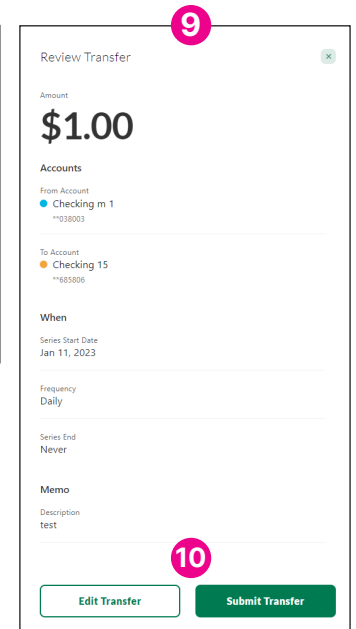
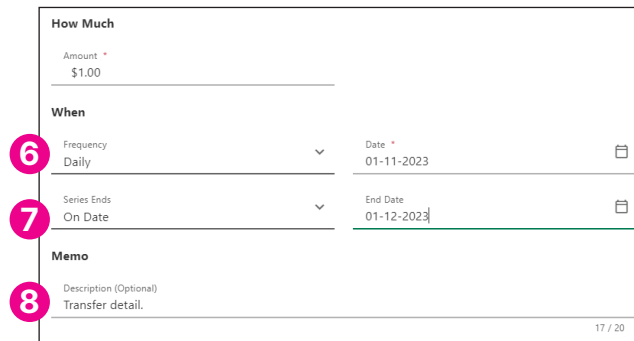
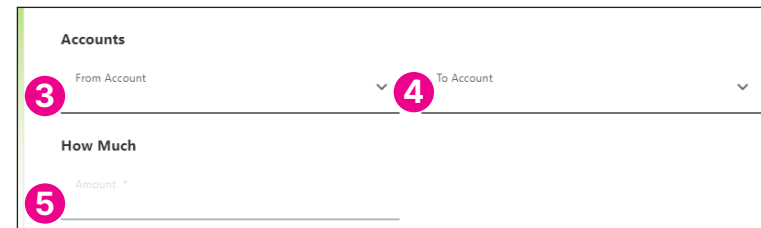
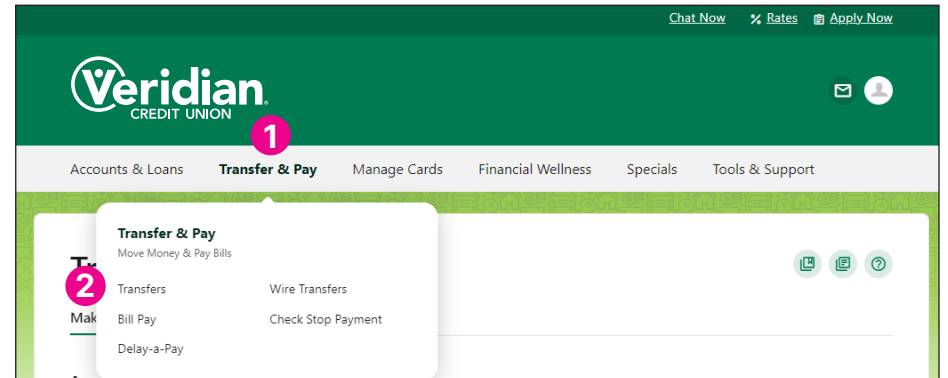
- 1 Select **Transfer & Pay** from the menu and select **Transfers**
- 2 If adding an external account, see **Adding Accounts** starting on page 3 of this document
- 3 Select the account where the transfer should originate from the dropdown
- 4 Select the account where the transfer should be deposited from the dropdown
- 5 Fill in the amount of the transfer

For a one-time transfer:

- 6 Select **One Time** on the dropdown and choose date of transfer

For a recurring transfer:

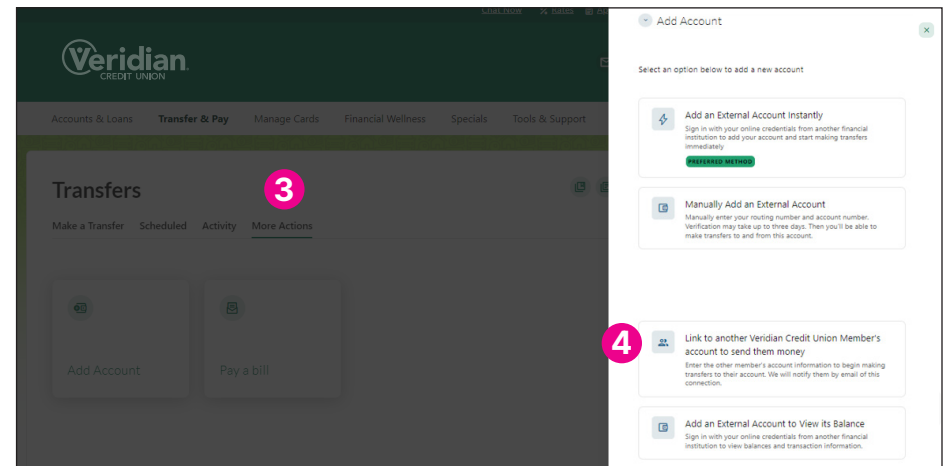
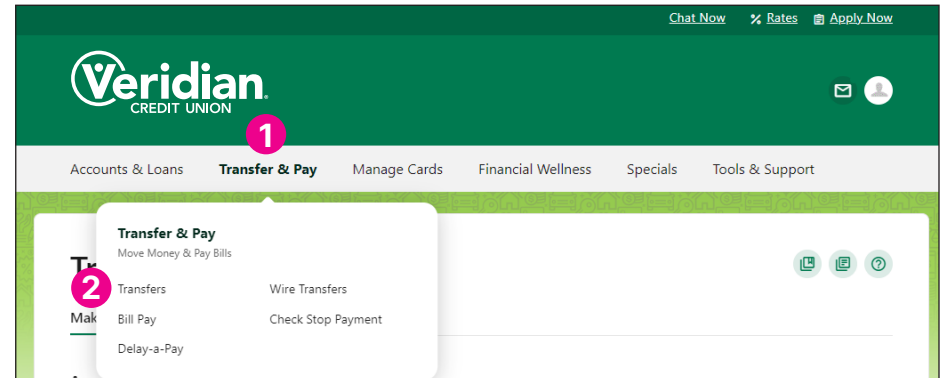
- 7 Select frequency, date of first occurrence, and the ending setting you would like
- 8 Add memo to make notes about the transfer for your records
- 9 Click **Review Transfer**
- 10 Click **Submit Transfer** or **Edit Transfer** if edits are necessary



Adding Accounts

For security reasons you may be asked to verify your identity.

- 1 Click on **Transfer & Pay**.
- 2 Click **Transfers**.
- 3 Select **More Actions** and then **Add Account**
- 4 Select **Link to another Veridian Credit Union Member's account to send them money**
- 5 Fill in the recipient's last name or the business's name.
- 6 Enter the account number of the recipient.
- 7 Check this box to save the account information. (Optional)
- 8 Click **Cancel** to cancel or **Save** to add the account.



This screenshot shows the 'Add Account at Veridian Credit Union' form. It contains the following fields and options:

- A text input field for 'Recipient's Last Name (Or Business Name) *' with a pink circle '5' next to it.
- A text input field for 'Recipient's Account Number' with a pink circle '6' next to it.
- A checkbox for 'Save Account for Future Use' with a pink circle '7' next to it.
- 'Cancel' and 'Save' buttons at the bottom right, with a pink circle '8' next to the 'Save' button.

A message states: 'We will send an email to the recipient notifying them of this connection.'

Adding Accounts

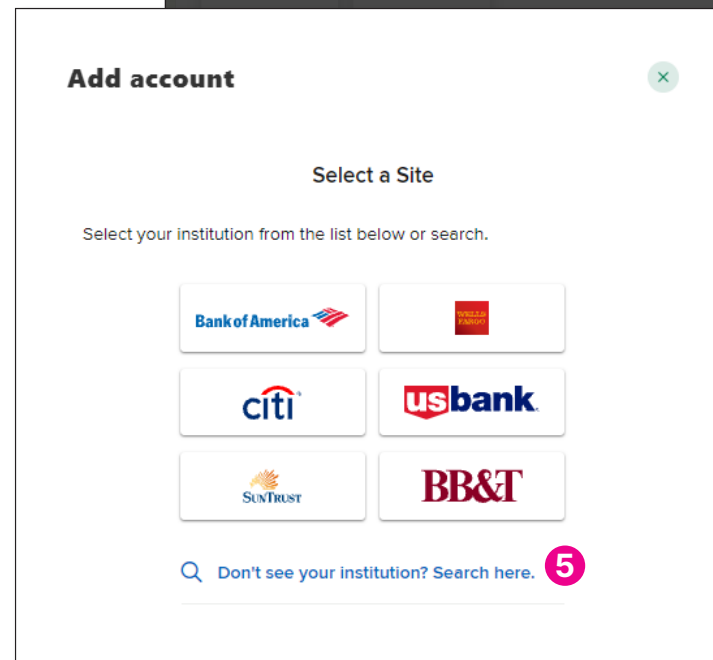
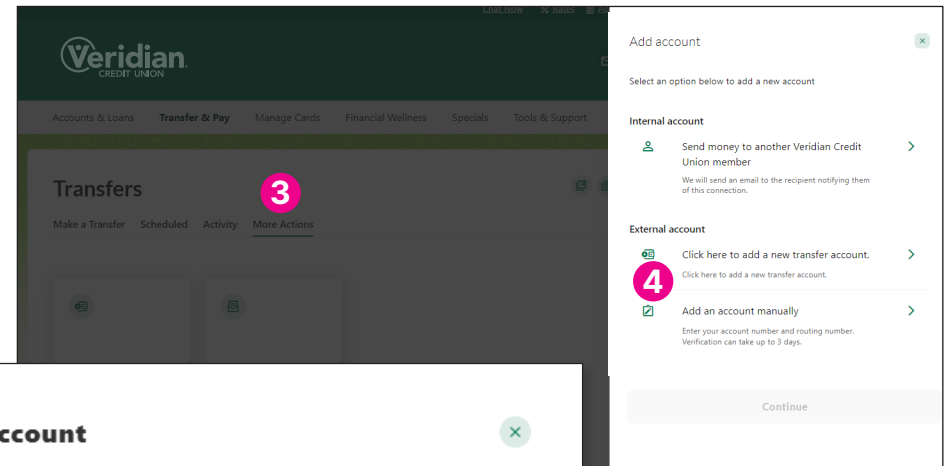
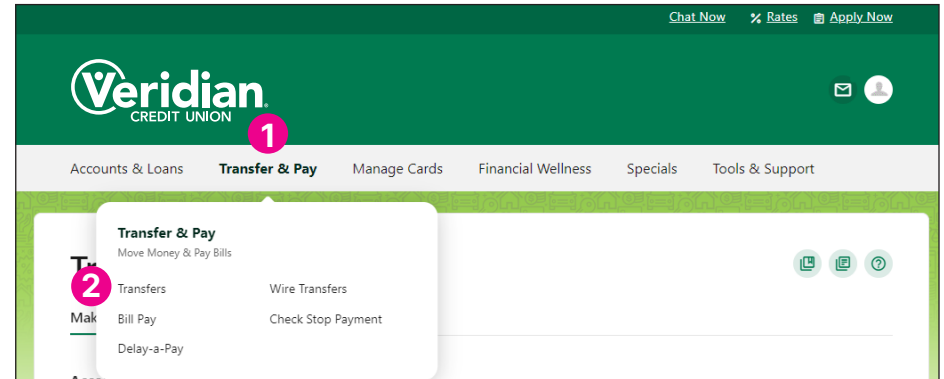
For security reasons you may be asked to verify your identity.

You can link your accounts from other financial institutions to see your balances and make transfers all in one place. Remember to select the option that allows you to see your balances when you set up those accounts.

To add an external account instantly:

You'll log in to your other financial's online banking during this process to verify that you own the account.

- 1 Click on **Transfer & Pay**.
- 2 Click on **Transfers**.
- 3 Select **More Actions** and then **Add Account**
- 4 Select **Click here to add a new transfer account**
- 5 Use the search bar to find your other financial, then enter your username and password to connect your accounts.



Adding Accounts

For security reasons you may be asked to verify your identity.

To add an external account using deposits:

Veridian will make two deposits less than \$1 in the external account. You will need to verify those deposit amounts with Veridian before you can transfer money between the external account and your Veridian accounts. **Please allow enough time for this process to occur (up to three days) before you need to make your first transfer.**

- 1 Click on **Transfer & Pay**.
- 2 Click on **Transfers**.
- 3 Select **More Actions** and then **Add Account**
- 4 Select **Manually Add an External Account**
- 5 Choose **Checking** for a checking account and **Savings** for a savings account.
- 6 Fill in the routing number for the external account. (You may need to ask the other financial institution for this number.)
- 7 Fill in the account number.
- 8 Type the account number again to confirm.
- 9 Give the account a nickname.
- 10 Click **Cancel** to cancel or **Save** to continue.
- 11 Once the deposits have been made in the external account, click on **Accounts** and then **Dashboard**.
- 12 Click **Dashboard**.
- 13 Click **Confirm**.
- 14 Enter the amount of the first deposit.
Enter the amount of the second deposit.
Click **Cancel** to cancel or **Confirm** to link the account.

