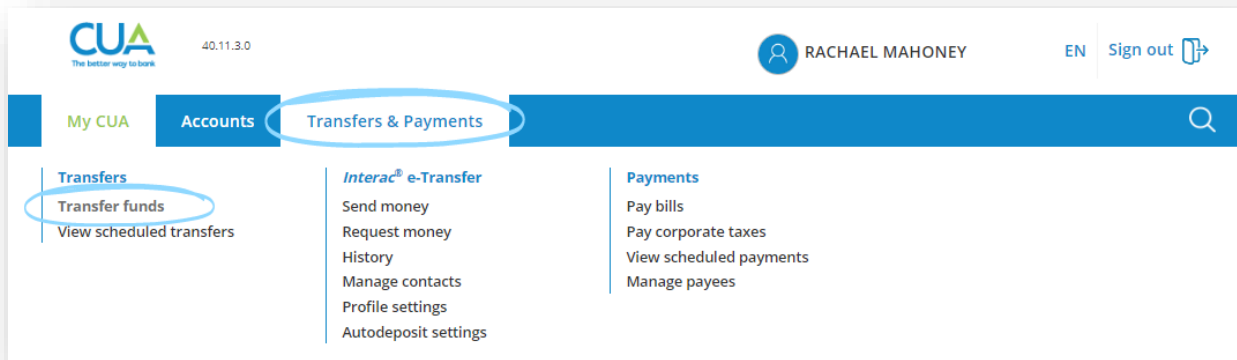


MEMBER WALKTHROUGH GUIDE

GUIDE 12: HOW TO TRANSFER FUNDS BETWEEN ACCOUNTS

1. Once you've set up your new online banking profile, you can begin performing transactions. To send a transfer, mouse over the 'Transfers & Payments' tab along the menu bar and select 'Transfer Funds' under the 'Transfers' section on the lefthand side of the drop-down menu.



2. You will then be brought to the 'Transfer Funds' page. First **1)** select the account you wish to transfer the fund from.

To transfer funds between your accounts, **2)** select 'My account' within the 'Transfer to' box and **2.1)** choose the account you want the funds transferred to from the dropdown menu. To transfer funds to another CUA member **2a)** select this option and enter the recipient's CUA account number.

Next, in the 'Transfer details' box, **3)** enter the amount you would like to transfer. **4)** Then, choose an immediate transfer, to schedule a transfer for a later date/time, or set up a recurring transfer (i.e., moving funds to savings account biweekly, sending rent payment monthly).

You can also choose to add a memo before **5)** selecting 'Continue' to proceed to the confirmation page.

The screenshot shows the 'Transfer Funds' page on the CUA website. The page has a blue header with the CUA logo and navigation tabs for 'My CUA', 'Accounts', and 'Transfers & Payments'. The main content area is titled 'Transfer Funds' and includes a sub-header with 'Details', 'Confirm', and 'Completed' tabs. Below the title, there is a brief instruction: 'You can transfer money from one of your accounts to another, or to another member today! The transfer can be performed immediately, scheduled for a future date, or scheduled on a recurring basis (such as monthly).' The 'Transfer from' section shows three account options: 'MY CHEQUING' (selected), 'MY SAVINGS', and 'MY HIGH INTEREST SA...'. The 'Transfer to' section has a radio button for 'My account' (selected) and a radio button for 'Another CUA member'. Below this is a dropdown menu for 'My account' and a text input field for 'Transfer to'. The 'Transfer details' section has a text input field for 'Amount' and radio buttons for 'Transfer type' (Immediate, Schedule, Recurring). The 'Memorandum' section has a text area for 'Memo (optional)'. At the bottom, there are 'Cancel' and 'Continue' buttons.

1) Transfer from

2) Transfer to

2.1) My account

2a) Another CUA member

3) Amount

4) Transfer type

5) Continue

3. You will then be asked to confirm your transfer details. If everything appears correct, select 'Continue'.


Note: To edit the information, select 'Back'. You can also select 'Cancel' to navigate back to the home page.





The screenshot displays the CUA online banking interface. At the top, the CUA logo and version number (40.11.3.0) are on the left, and the user's name (CUA Member) and language (EN) with a sign-out option are on the right. The navigation bar includes 'My CUA', 'Accounts', and 'Transfers & Payments'. The main heading is 'Transfer Funds', with tabs for 'Details', 'Confirm' (which is underlined), and 'Completed'. A warning banner at the top of the main content area says 'Confirm transfer details'. Below this, the 'Transfer from' section shows 'Account MY CHEQUING -'. The 'Transfer to' section shows 'Account MY HIGH INTEREST SAVINGS -'. The 'Transfer details' section lists: 'Amount \$', 'Transfer type Immediate', and 'Transfer date Jul 15, 2024'. At the bottom, there are three buttons: 'Cancel', 'Back', and 'Continue'. The 'Continue' button is highlighted with a blue circle and a blue arrow pointing to it.

4. After confirming your transfer details, you will be brought to a confirmation screen stating your transfer was successfully completed. You then have the option to print or export the page for your records. You are also able to add this as a favourite transaction or navigate to a different page.

Transfer Funds

Details Confirm **Completed**


Transfer successfully completed.

 **Print**  **Export**  **Favourites**  **Navigate to**

Transfer from

| | |
|----------------|---------------|
| Account | MY CHEQUING - |
|----------------|---------------|

Transfer to

| | |
|----------------|----------------------------|
| Account | MY HIGH INTEREST SAVINGS - |
|----------------|----------------------------|

Transfer details

| | |
|----------------------|--------------|
| Amount | \$ |
| Transfer type | Immediate |
| Transfer date | Jul 15, 2024 |