Transfer Money to Another Financial Institution

With Patelco Online™, it’s easy to transfer money to another financial institution. To get started, select the TRANSFERS widget.

1. Select the **Add an external account** link.

2. Add the external account information by providing an Account Type (Checking or Savings), Routing Number, Account Number, and Nickname.
3. Verify your identity by selecting a preferred method (text, email or call) to receive the security code. Click the Send code button.

4. After receiving the code, enter it in the text box shown below and click on the Verify button.
5. A confirmation box will appear. As a security measure, we cannot transfer funds from this account until it has been confirmed. We’ll send two (2) trial deposits to your external account.

6. Within 2-3 days your trial deposits will appear in your external account. Once visible, log in to Patelco Online™ and click on the Confirm button on the main page.

7. Select the Confirm button next to the external account.
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8. Enter the trial deposit amounts and select **Confirm**.

![Confirm Trial Deposits dialog box](image)

9. Now you are ready to transfer funds. Select the transfers widget and click on the **From Account** drop down to view the newly added external account and then select the **To Account** drop down. Choose the amount, transfer date, and frequency and then select the **Submit Transfer** button.

```
Amount
$ 100.00

Transfer Limits
Date
1/3/2020

Frequency
One Time

Submit Transfer
```

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