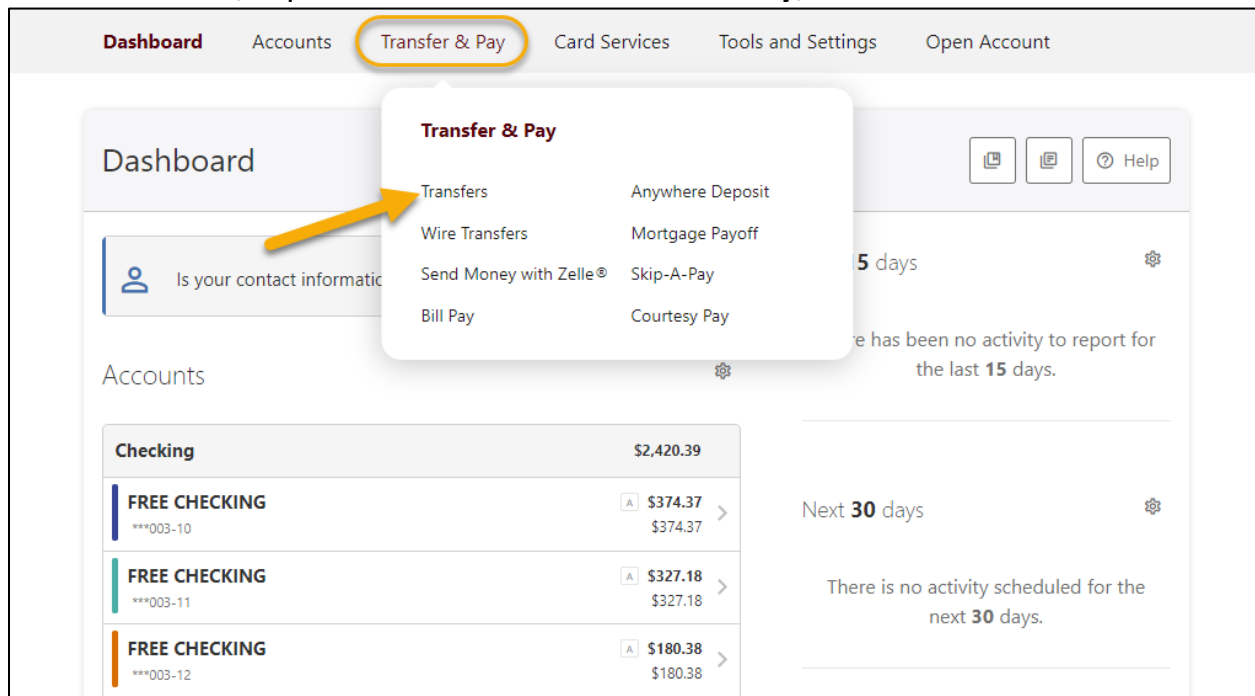




Transfer Money to Another Member

With [Patelco Online™](#), it is easy to send money to another Patelco member who also has online banking.

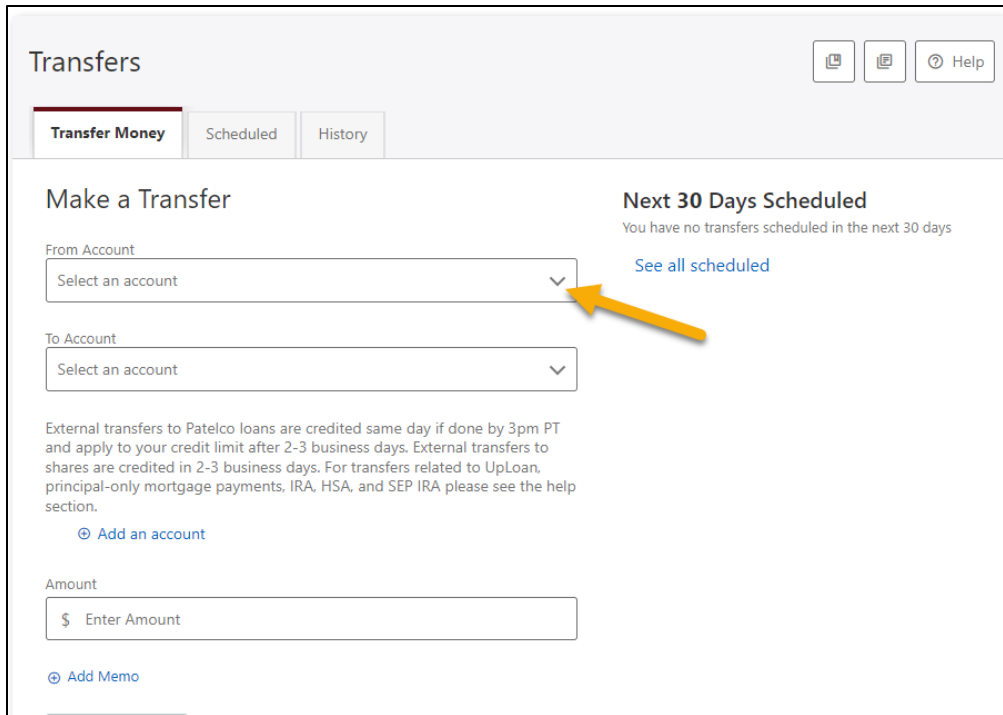
1. To schedule a new transfer to another member who has online banking, from the main menu, tap or hover over to **Transfer & Pay**, then select **Transfers**.



If you want to send money to another member who does not have online banking access, select the **Send Money with Zelle®** under the **Transfer & Pay** menu to enroll.

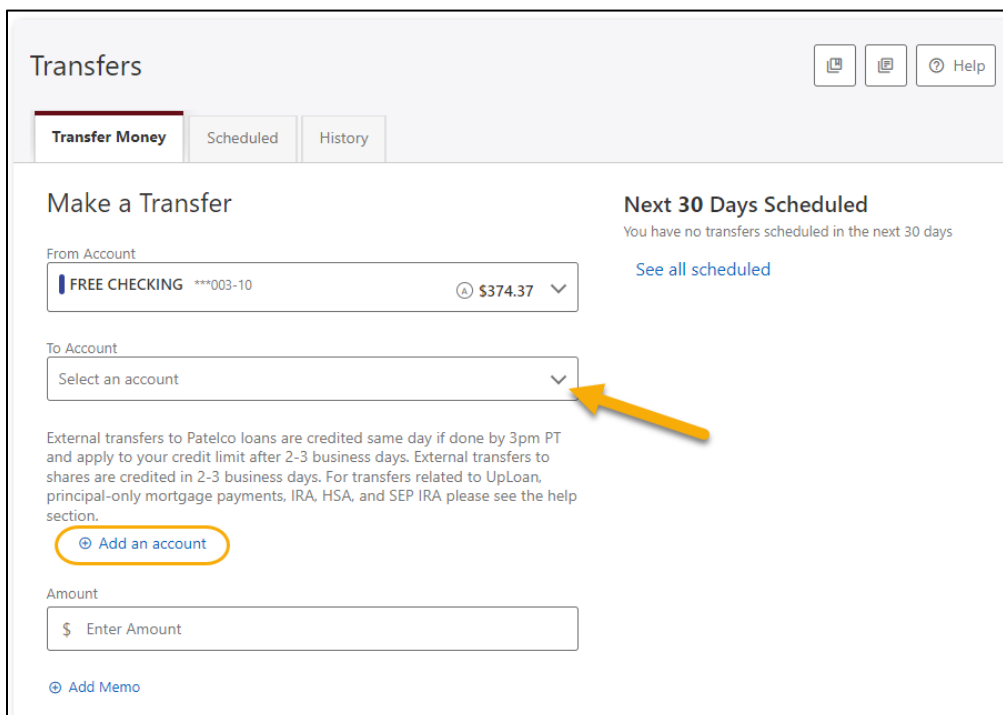


2. Choose your **From Account**.



The screenshot shows the 'Transfers' page with the 'Transfer Money' tab selected. The 'Make a Transfer' section has two dropdown menus: 'From Account' and 'To Account', both currently showing 'Select an account'. A yellow arrow points to the 'From Account' dropdown. To the right, the 'Next 30 Days Scheduled' section indicates no transfers are scheduled. Below the dropdowns, there is a text block explaining transfer rules and an 'Add an account' link. At the bottom, there is an 'Amount' input field and an 'Add Memo' link.

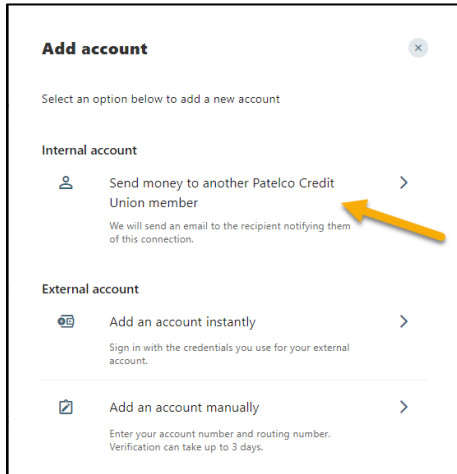
3. Then select your **To Account**. If you have previously sent money to this other member, their account should appear in the **To Account** drop-down menu. If their account does not appear, or if you have not sent money to them before, select the **Add an account** link.



The screenshot shows the 'Transfers' page with the 'Transfer Money' tab selected. The 'Make a Transfer' section now has the 'From Account' dropdown populated with 'FREE CHECKING ****003-10' and a balance of '\$374.37'. The 'To Account' dropdown menu is highlighted with a yellow arrow. The 'Next 30 Days Scheduled' section remains the same. The 'Add an account' link is now circled in yellow. The 'Amount' input field and 'Add Memo' link are also visible.



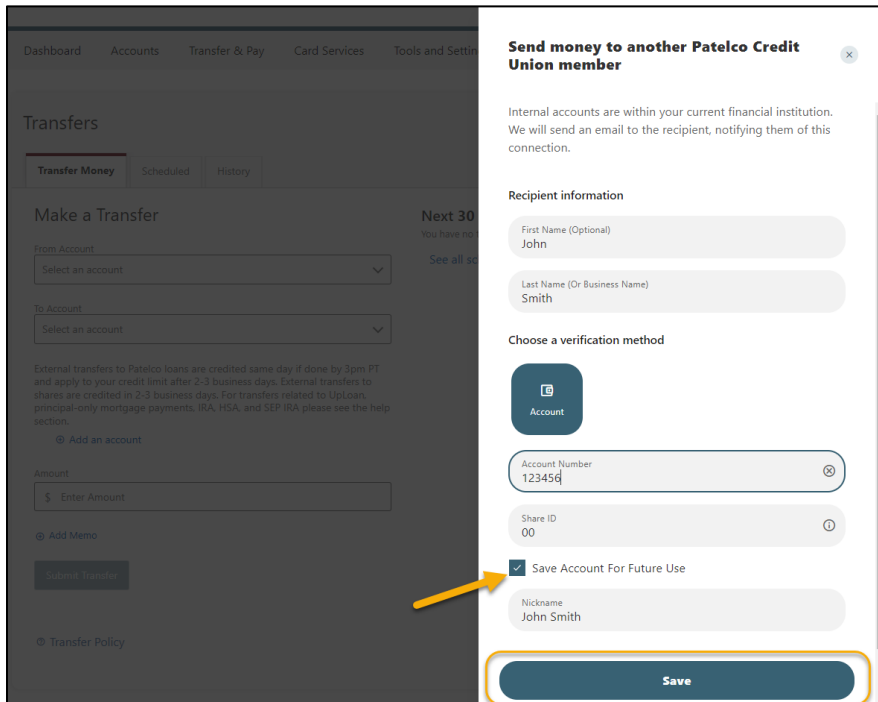
4. Select **Send money to another Patelco Credit Union member**.



5. Enter the other member's details:

- **First Name (Optional)**
- **Last Name (Or Business Name)**
- **Account Number**
- **Share ID** (such as 00 or 10)

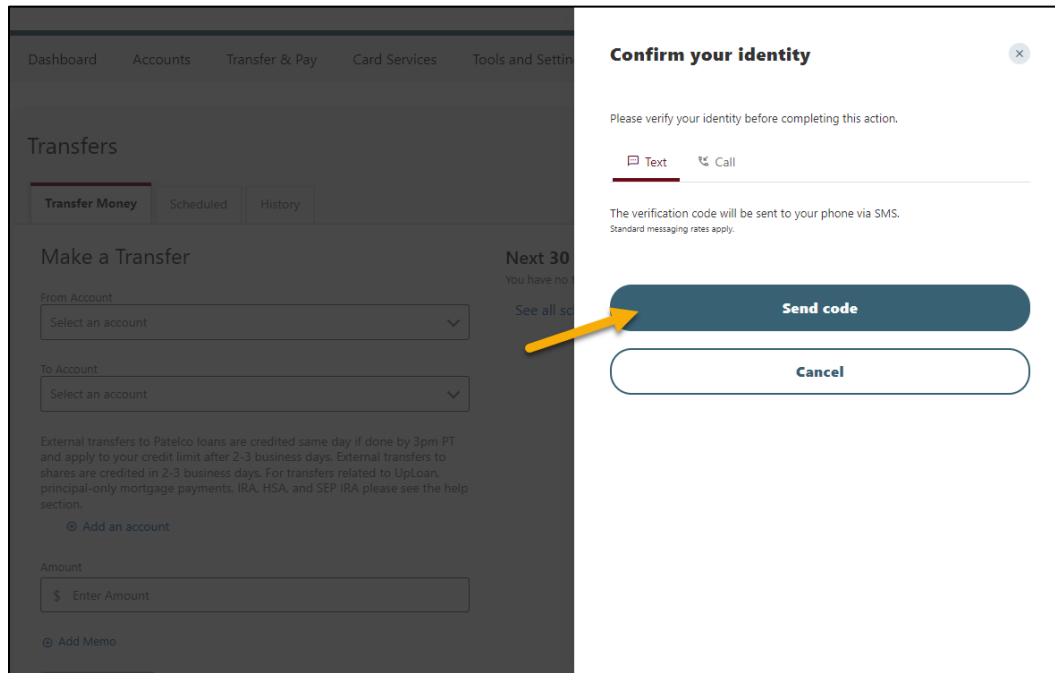
*If you want to be able to send transfers again to this person in the future, select the box next to **Save Account For Future Use**, and give it a **Nickname**.*



6. Then select **Save**.



7. Verify your identity by selecting a preferred method (text or call) to receive a verification code, then select the **Send code** button.



8. After receiving the code, enter it in the text box and select the **Verify** button.

9. Now you are ready to transfer funds. Tap or hover over **Transfer & Pay**, select **Transfers**, choose an account from the **From Account** and **To Account** drop-down menus, then enter the **Amount**, the **Date**, and the **Frequency**. You can also select **Add Memo** to include a note or reason with your transfer.



Transfers 📄 📄 🔗 Help

Transfer Money | Scheduled | History

Make a Transfer

From Account
Select an account

To Account
Select an account

External transfers to Patelco loans are credited same day if done by 3pm PT and apply to your credit limit after 2-3 business days. External transfers to shares are credited in 2-3 business days. For transfers related to UpLoan, principal-only mortgage payments, IRA, HSA, and SEP IRA please see the help section.

[Add an account](#)

Amount
\$ Enter Amount

[Add Memo](#)

Submit Transfer

[Transfer Policy](#)

Next 30 Days Scheduled
You have no transfers scheduled in the next 30 days
[See all scheduled](#)

10. Review the transfer details and then select **Submit Transfer**.

Transfers 📄 📄 🔗 Help

Transfer Money | Scheduled | History

Make a Transfer

From Account
Select an account


To Account
Select an account

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[Add an account](#)

Amount
\$ Enter Amount

[Add Memo](#)

Submit Transfer 

[Transfer Policy](#)

Next 30 Days Scheduled
You have no transfers scheduled in the next 30 days
[See all scheduled](#)



11. If your transfer was an immediate one-time transfer, select the **History** tab to see it, select the **Scheduled** tab to manage future and recurring transfers.

Transfers

Transfer Money Scheduled History

Make a Transfer

From Account

To Account

External transfers to Patelco loans are credited same day if done by 3pm PT and apply to your credit limit after 2-3 business days. External transfers to shares are credited in 2-3 business days. For transfers related to UpLoan, principal-only mortgage payments, IRA, HSA, and SEP IRA please see the help section.

[Add an account](#)

Amount

[Add Memo](#)

[Transfer Policy](#)

Next 30 Days Scheduled

You have no transfers scheduled in the next 30 days

[See all scheduled](#)