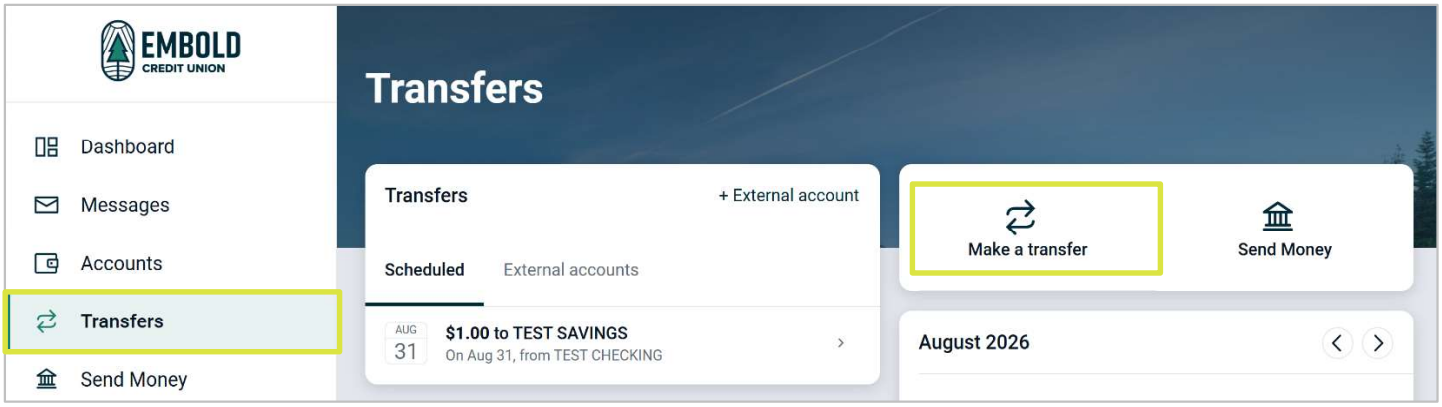
Transfers

Move money between your Embold Credit Union accounts or other external financial institutions.

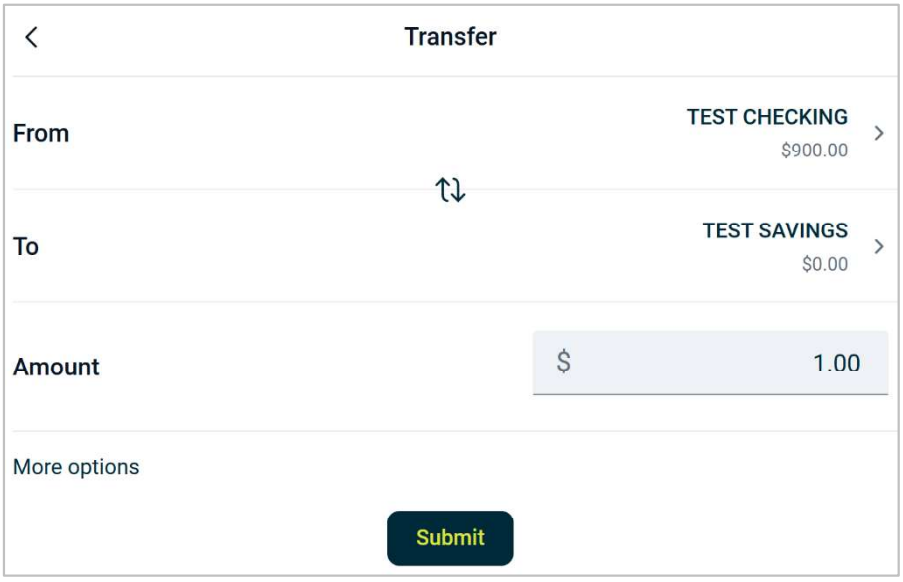
Submit a Transfer

1. From the Dashboard, click **Transfers** on the left-hand menu. Click **Make a Transfer** from the **Transfers** page. You may also click **Transfer** from the Dashboard **Quick Action** buttons.



2. Select your **From** and **To** accounts and enter the amount to transfer.
3. Click **More options** to set up a recurring frequency, select a future date, or add a memo if applicable.
4. Click **Submit**.

   Future dated or recurring transfers will appear on the Transfers page under the Scheduled tab. They will also appear on the Transfers card on the Dashboard.



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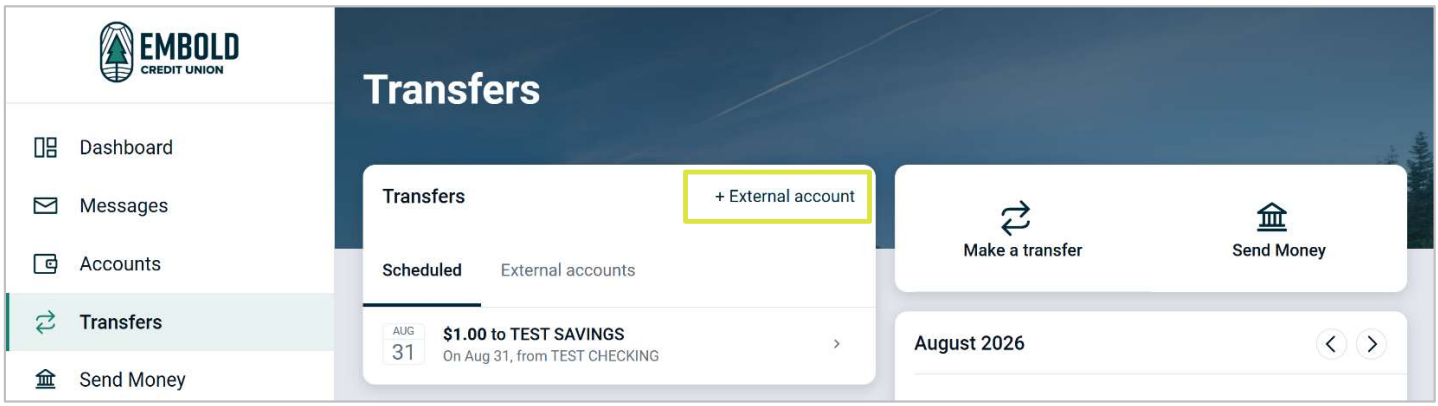
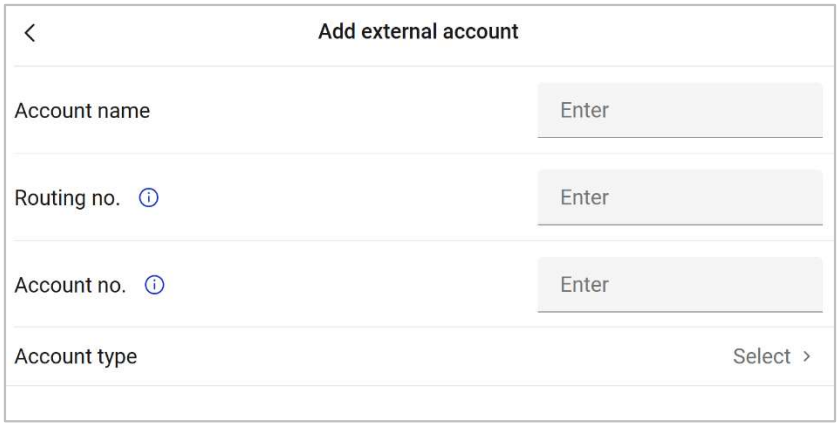
Add an External Transfer Account (Consumers Only)

1. Select **Transfers** from the navigation pane.
2. Click **+ External Account** in the Transfers card.
   PLEASE NOTE: You will be prompted to complete muti-factor authentication. The MFA options will vary depending on which verification method(s) you have established.



3. Enter an **Account name** or nickname for the account, **routing number**, **account number**, and select the **account type**. Click **Submit**.



Account Verification Required: Two micro deposits will be sent to your external account in 1-3 business days. Upon receipt of the micro deposits, you will need confirm the deposit amounts to acknowledge you are entitled to access the external account. Please see the Verifying an External Transfer Account section for more information.

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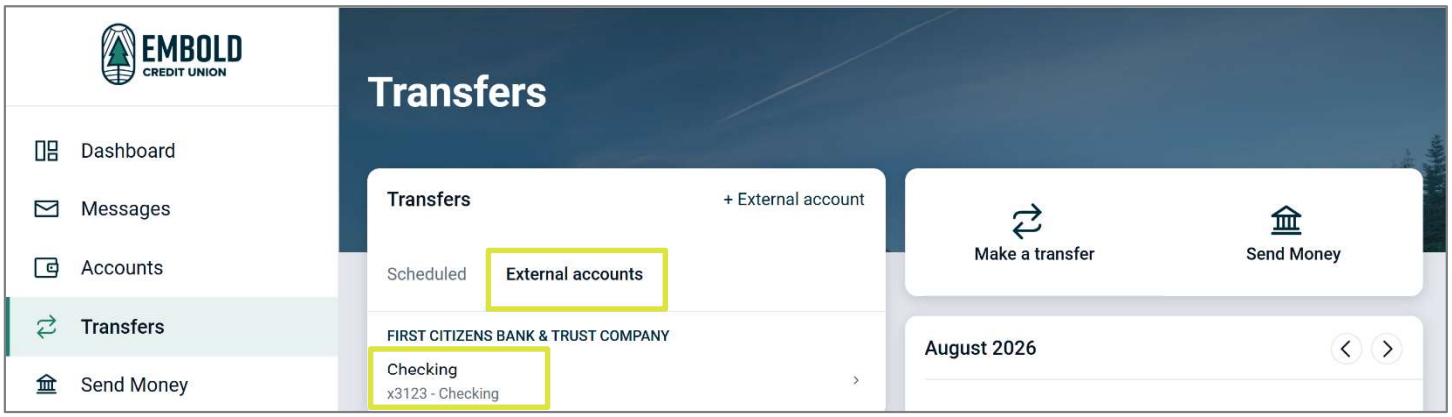
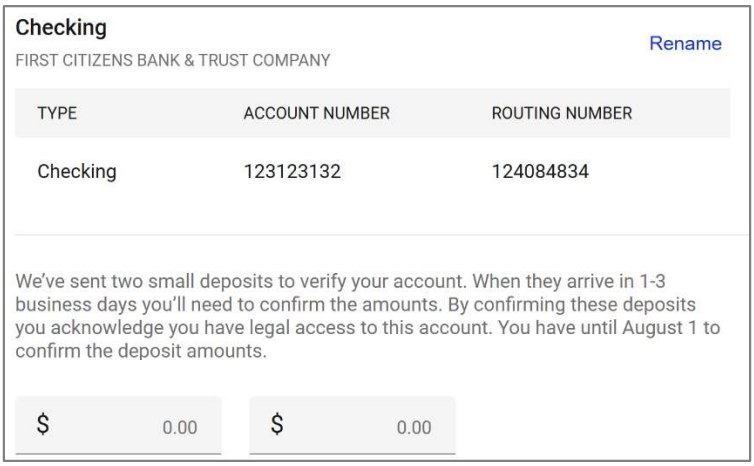
Verifying an External Transfer Account

1. Navigate to the Transfers page and click the **External accounts** tab. Click the account to verify.

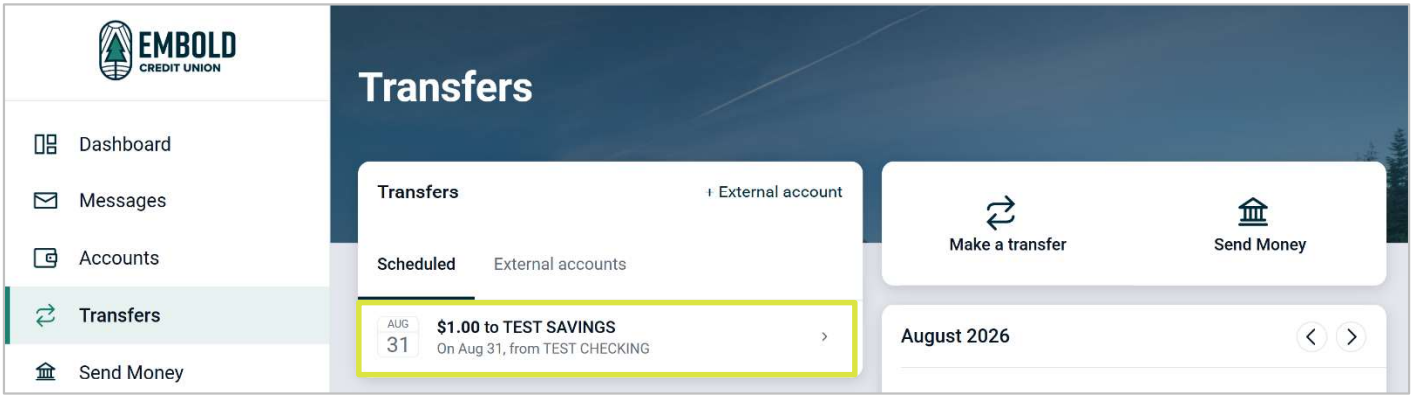


2. Enter the micro deposit amounts received in the external account and click **Confirm**. The account will now appear as a From or To account when creating a transfer.



Edit or Delete a Scheduled Transfer

1. Navigate to the **Transfers** card on the Dashboard or the **Transfers** page and select the transfer to edit or delete.



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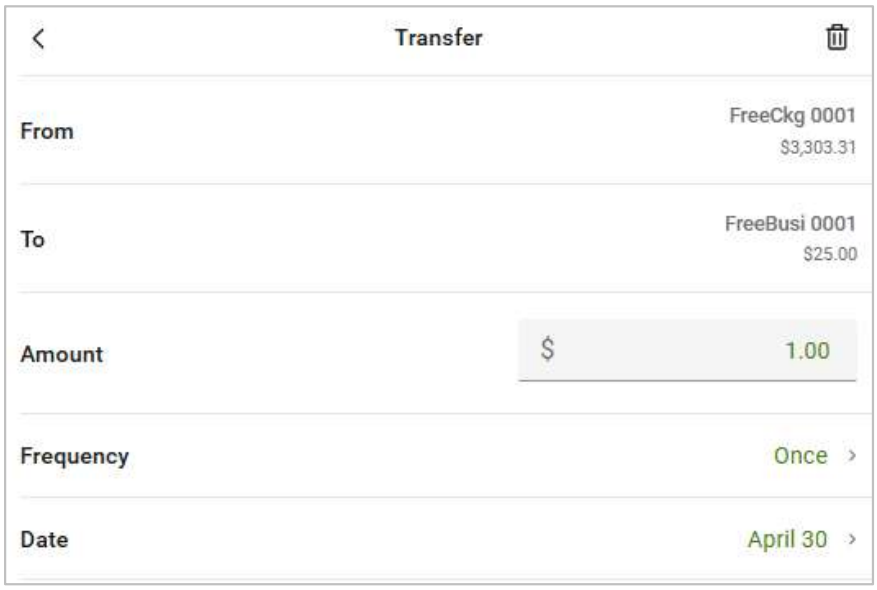
2. Modify details and click **Save** or select the **trash can** icon to delete.

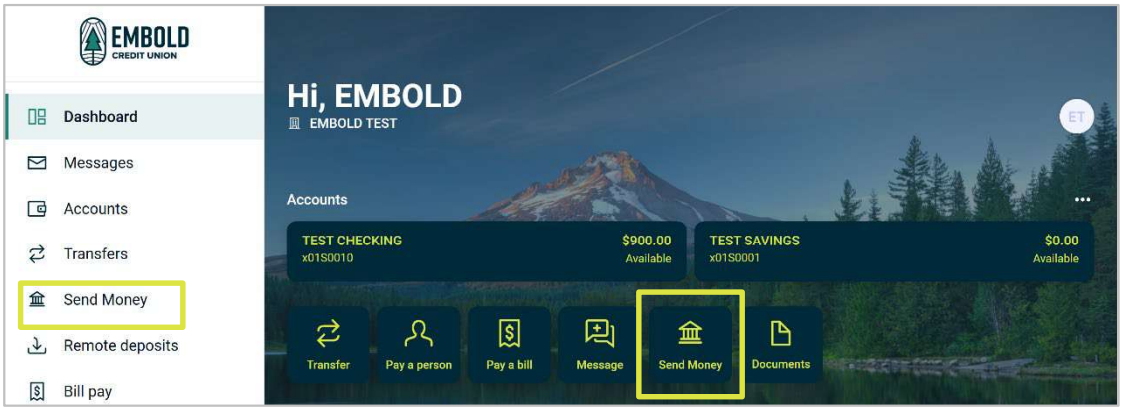


Send Money

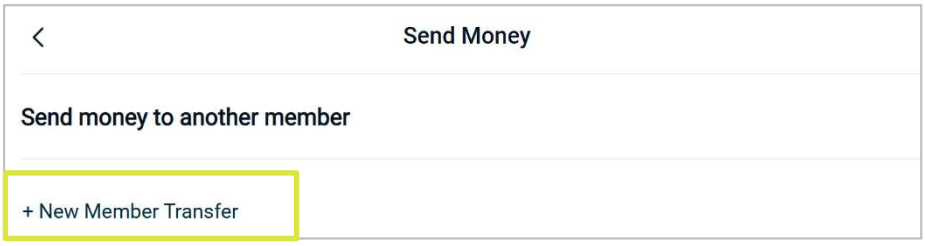
Use this feature to transfer money to another Embold Credit Union member.

Send Money to Another Embold Credit Union Member

1. Click Send Money from the navigation pane or from the Dashboard Quick Action buttons.



2. Click + New Member Transfer



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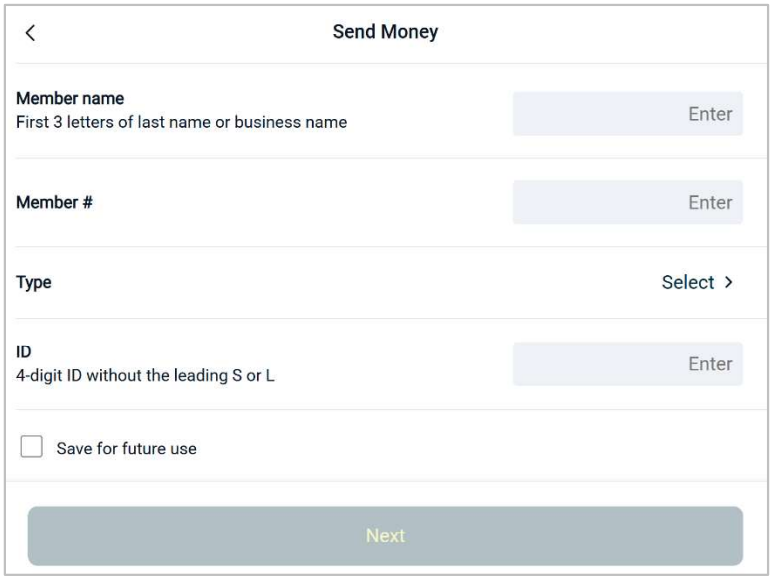
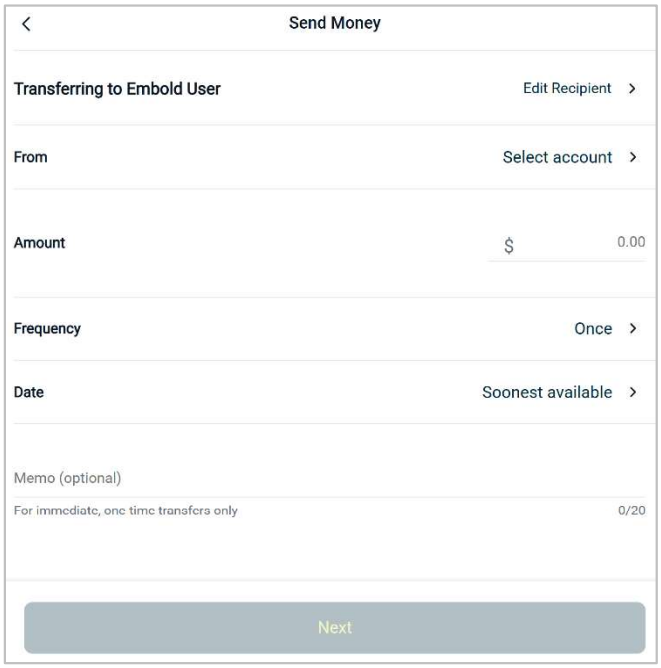
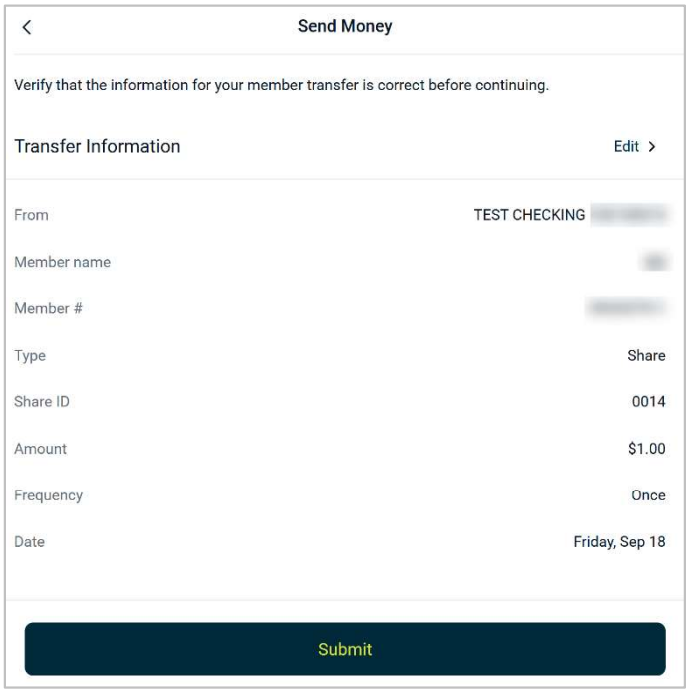
3. Enter the Embold Credit Union Member's information.
4. Check the box next to **Save for future use** and enter a nickname for the member if you plan to send money to them again.
5. Click **Next**.
6. Select the account to transfer from, enter the amount, choose a recurring frequency if applicable, and select the date to transfer the funds. Click **Next**.

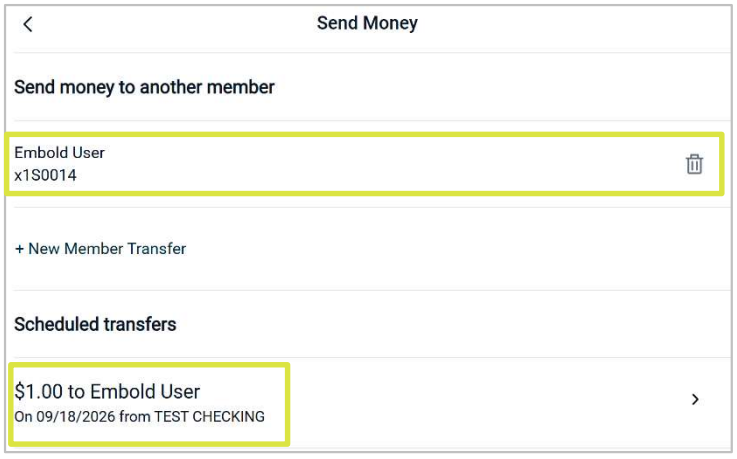




7. Review the details and click **Submit**.

   Future dated transfers will appear on the Send Money page under Scheduled transfers. If you saved the member's information, they will appear as a template for future use.





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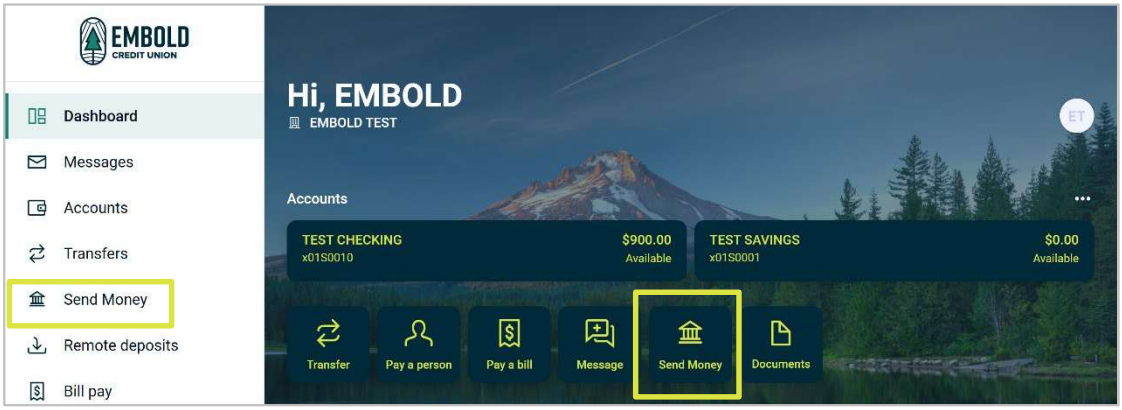
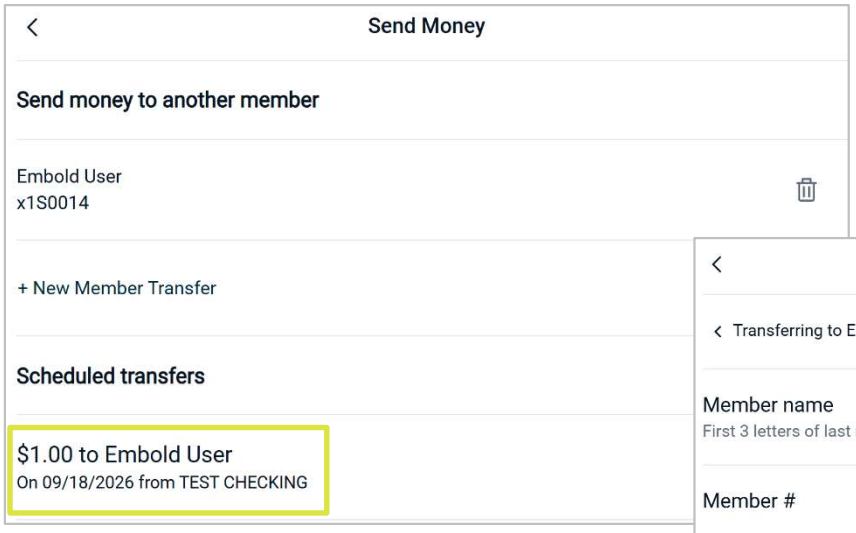
Edit or Delete a Send Money Transfer

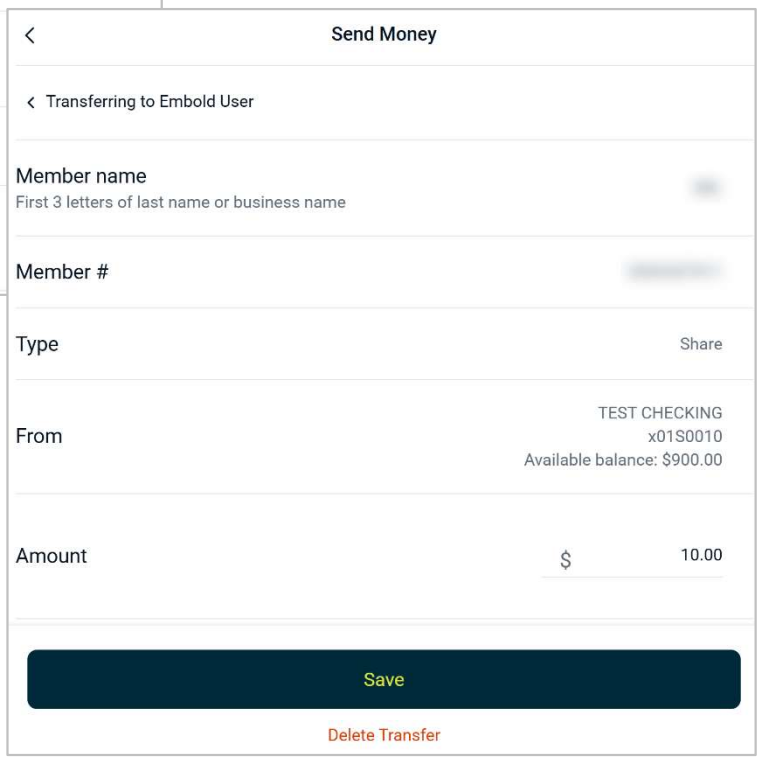
Please note that only future dated or recurring transfers can be edited or deleted.

1. Click Send Money from the navigation pane or from the Dashboard Quick Action buttons.



2. Select the scheduled transfer.
3. Modify the details and click **Save** or click **Delete Transfer** to stop the transfer.





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