



Transfers Quick Reference Guide

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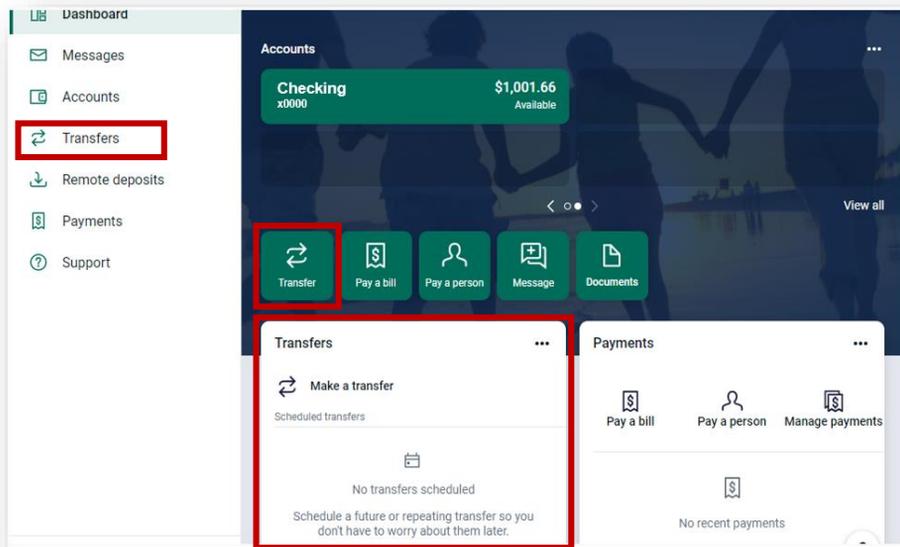
Transfers

Quick Reference Guide

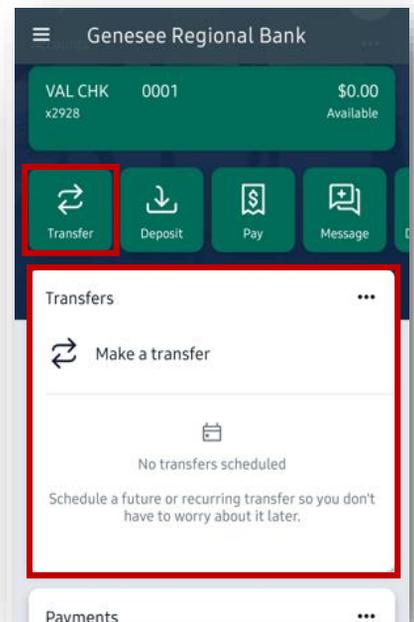
Accessing Transfers

- There are multiple ways to access Transfer options:
Dashboard Cards, Dashboard Icons, and the left side menus.
 - Use the dashboard cards or icons to access the “Make a transfer” screen.
 - Use the Transfers option on the left side menus to access the full transfer screen.

View Upcoming Transfers



Desktop View



Mobile View



Making Transfers

- You must click on the Transfers from the left Menu to access the full transfer page
- View Scheduled Transfers in list view, or using the calendar.
- View your added external accounts and add external accounts by clicking *+ External account*
- Click *Make a transfer* to start the transfer process

Make A Transfer

Transfers

Transfers + External account

Scheduled External accounts

No transfers scheduled

Schedule a future or recurring transfer so you don't have to worry about it later.

Make a transfer

March 2022

SUN	MON	TUE	WED	THU	FRI	SAT
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Only the next scheduled transaction is shown for your recurring transfers.

Transfer

From Checking \$ [REDACTED]

To Spare Acct \$ [REDACTED]

Amount \$ 5.00



Making Transfers

- Create One-time, scheduled or recurring transfers
- Use this option to transfer funds between your own accounts. You can create a one-time, scheduled, or recurring transfer.
- **Step 1:** Select the From and To accounts
 - **NOTE:** You may also transfer From/To previously set up external accounts – *see next page*
- **Step 2:** Enter your transfer amount
- **Step 3:** Click More Options to expand options for Frequency, Schedule date, and memo. Click *Submit*

The screenshot shows a mobile app interface for making a transfer. At the top, there is a back arrow and the title "Transfer". Below this, there are two rows for account selection: "From" (Checking) and "To" (Spare Acct), each with a swap icon between them. The "Amount" field is set to "\$ 5.00". The "Frequency" is set to "Once" and the "Date" is set to "Soonest available". There is a "Memo" field with a placeholder "Memo" and a character count "0/20". A "Hide options" link is visible. At the bottom, there is a green "Submit" button and a note: "Transfers completed after 10:00 PM may be processed the next business day."

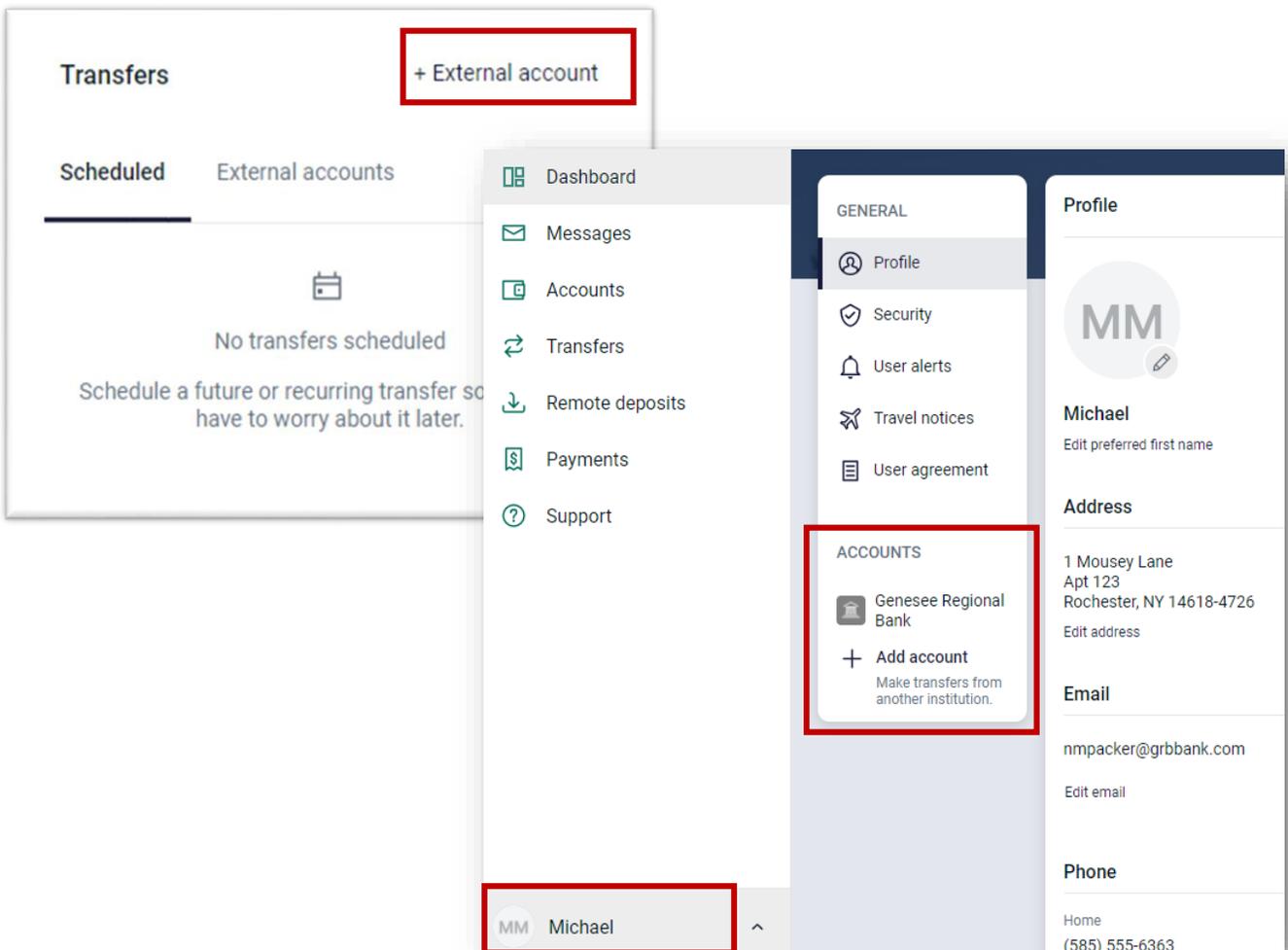
This screenshot shows the expanded "Frequency" options menu. It has a back arrow and the title "Transfer". The options listed are: "Once" (which is selected with a checkmark), "Weekly", "Every two weeks", "Twice a month", and "Monthly".

Frequency Option View



External Transfers

- You must first set up an external account.
- Use this option to transfer funds between your GRB accounts and accounts at other Financial Institutions.
- Add External account clicking *+ External account* on the transfer page.
 - You can also view and add external accounts by clicking on your name from the bottom of your menu, go to *Settings* and select *Add Account*



Transfers FAQs

Q. How do I transfer money between my accounts at another bank with online banking?

A. We have great options for moving money between your accounts at another bank.

- External Transfers allow you to transfer funds to and from your GRB accounts and your accounts at other financial institutions. To add an external transfer account, you may do so in the Transfers section by clicking *+ External account* on desktop or *Add External account* on mobile.
- Bill pay allows you to send money to another account via our Pay a person option. To access all pay a person options, click on *Payments* on the left or flyout menu in mobile. Select *+ New payee* on desktop, or *Add a Payee* on mobile.

Q. How do I transfer funds between accounts?

A. For internal transfers between your GRB accounts, you can do this from the Dashboard Transfers Card, or by clicking on Transfers on the left or flyout menu. Select *Make a transfer* and choose your From and To accounts. Then choose the amount you'd like to transfer and frequency options under "More options" if applicable. Click Submit.

Q. What is the cut off time for transfers?

A. You may make transfers 24/7. Any transfers made before 10:00 p.m. will be credited the same business day. Transfers scheduled on weekends or bank holidays will be credited the next business day.

