

AOCU 2.0 ONLINE BANKING

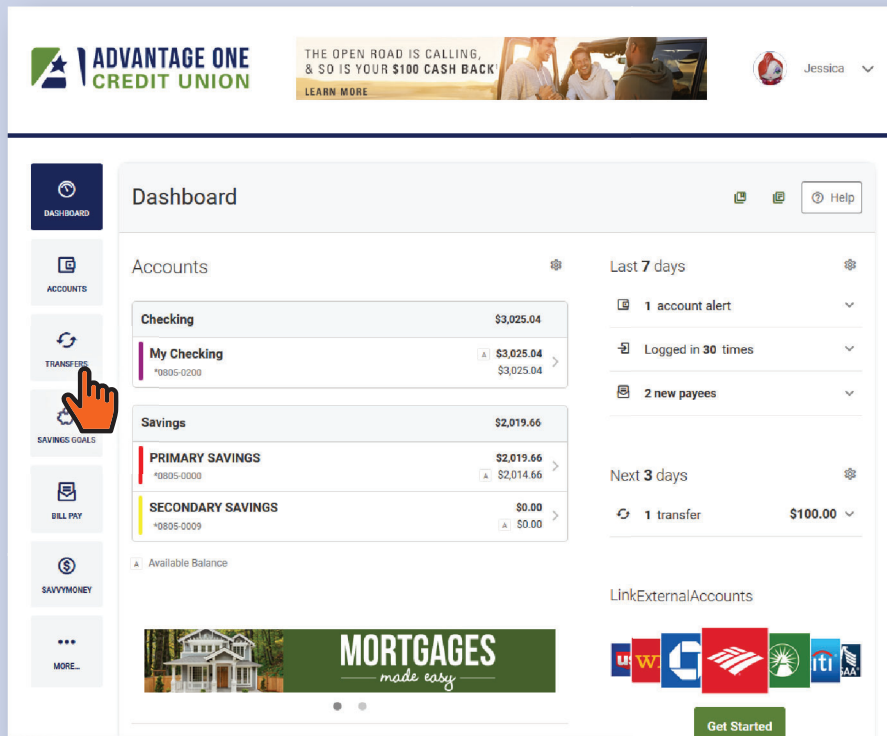
MEMBER TO MEMBER TRANSFERS



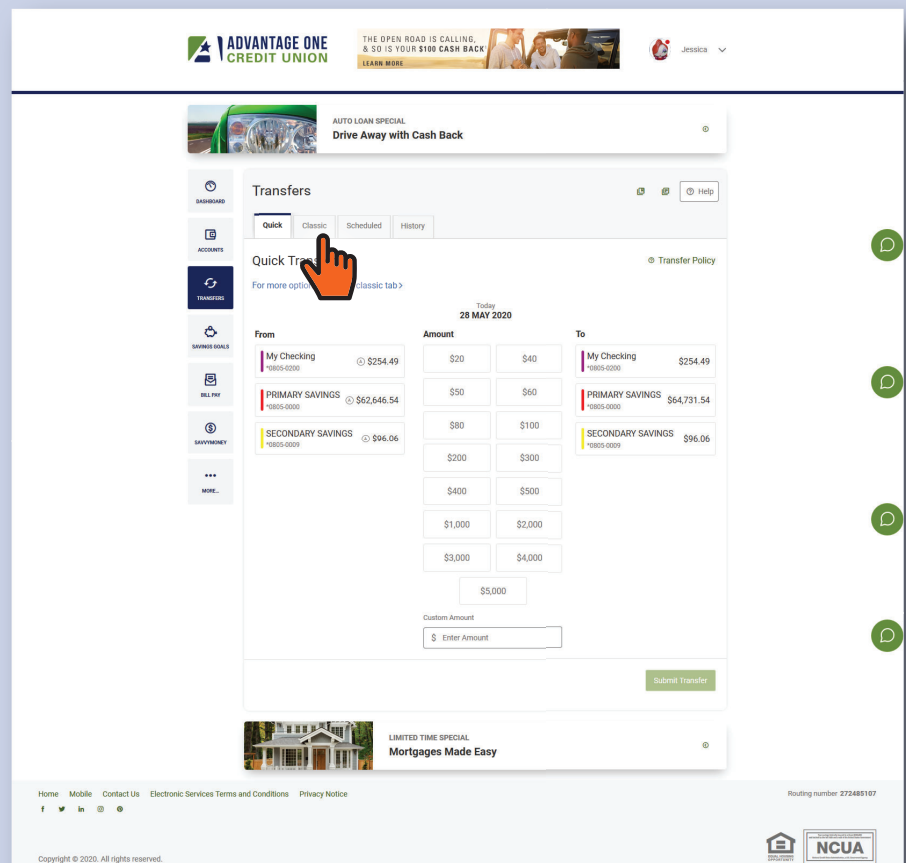
FOR MORE UPGRADE DETAILS VISIT [MYAOCU.COM/AOCU2](https://myaocu.com/aocu2)

This guide is for Member to Member transfers, transfers between you and other non-joint Advantage One members. It only covers those aspects that differ from Quick, and Classic Transfers. To get an overview of the entire transfer process, we highly recommend that you review the Quick Transfer and Classic transfer Guides before viewing this guide.

From the Dashboard, click the “Transfers” widget.



When you enter the Transfers page, you will be on the Quick tab by default. Click the “Classic” tab to get started with your member to member transfer.



On the Classic Transfer tab, select your “From Account”, the account you wish to take the money out of.

Instead of selecting a “to Account” skip down to where it says “Transfer to another Advantage One Credit Union member” and click that option. Next you will add your new recipient.

Transfers

Quick **Classic** Scheduled History

Make a Transfer

From Account
Select an account

To Account
Select an account

Don't see the account you want to transfer to?

- ⊕ Transfer to another Advantage One Credit Union member
- ⊕ Add an external account

Amount
\$ Enter Amount

⊕ Add Memo

Submit Transfer

⊕ Transfer Policy

You will see a pop-up that asks you to provide the following information about the recipient:

- Last name
- Recipient's share account number (ex. 123456)
- Recipient's Share ID (ex. 0200, 0000, etc.)

Finally, give your account a Nickname that will allow you to identify it on your Dashboard.

Click “Save”.

Add Account at Advantage One Credit Union

Last Name (Or Business Name) *

We will send an email to the recipient, notifying them of this connection.

Recipient's Share Account Number

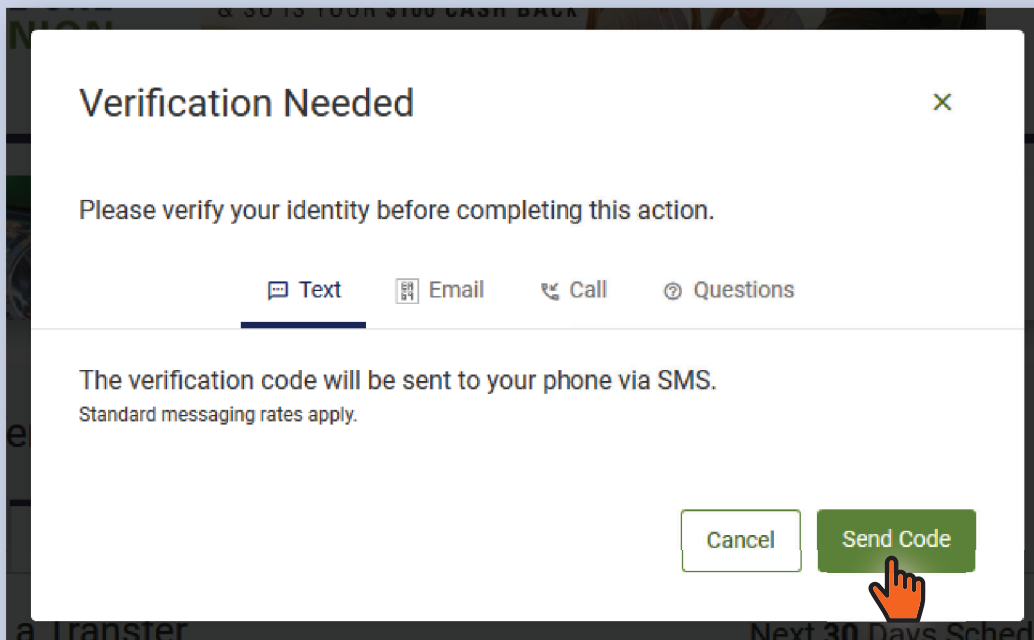
Share ID

Nickname ? *

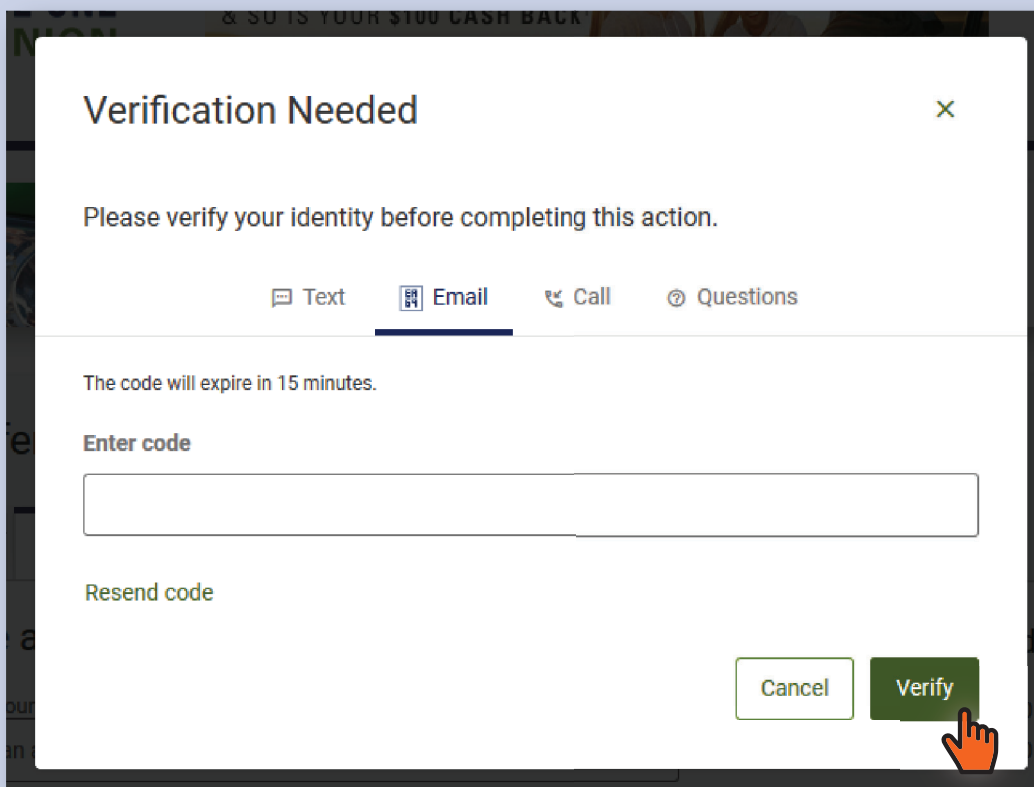
Cancel Save

After clicking Save, you will be presented with a verification screen. This is to protect your account from fraud and ensures that both you, and your recipient are okay with setting up a transfer relationship. You can choose to have the verification code sent via email, text, or via a phone call. Make your selection and click "Send Code".

Your options may be restricted depending on what contact methods you have established with the credit union. (You may update your contact information anytime in Online Banking by going to Settings and then clicking the "Contact" tab.)



After sending the code, you will have 15 minutes to retrieve the code and enter it into the verification box. After you have entered the number, click "Verify".



With a successful verification, you will be returned to the “Make a Transfer” screen. You have added the external account as a Payee. Once a Payee is added, you won’t have to go through the verification process again. You will be able to simply select them from the list of accounts.

Transfers

Quick **Classic** Scheduled History

Make a Transfer

From Account

My Checking *0805-0200 Ⓜ \$0.00 ▼

To Account

Yang-**0200 *2345-0200 ↔ ▼

Don't see the account you want to transfer to?

- Ⓜ Transfer to another Advantage One Credit Union member
- Ⓜ Add an external account

Amount

\$ Enter Amount

Date

05/28/2020 📅

Frequency

One Time ▼

Ⓜ Add Memo

Submit Transfer

Next, simply complete the transfer as you would any other. A full overview of both Quick and Classic Transfers are covered detail in our Quick and Classic Transfer Guides.