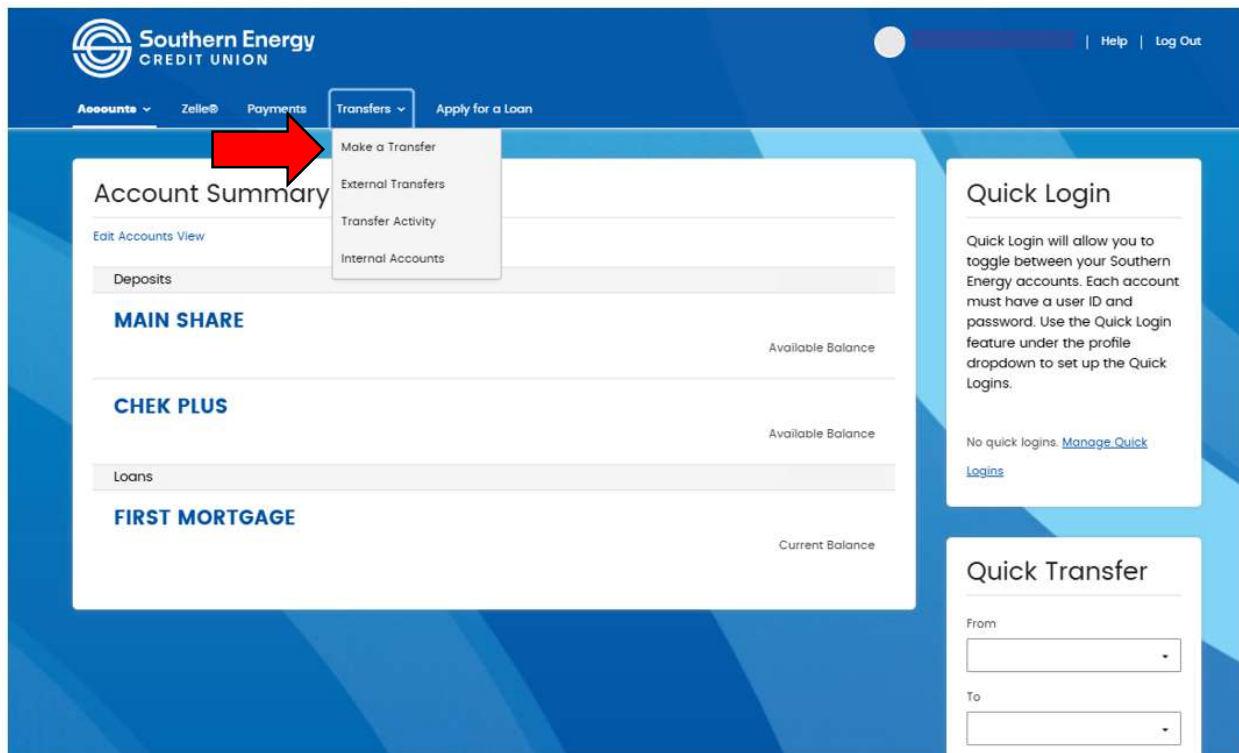


Setting Up One-Time or Recurring Transfers

Digital Banking offers simple tools to set up recurring or one-time transfers, both immediate and on a future date. See detailed instructions for both Online Banking and our Mobile Banking App below.

SETTING UP TRANSFERS IN ONLINE BANKING

1. Log into Online Banking.
2. Choose Transfers from the top menu and select *Make a Transfer*.



You will see the Make a Transfer screen below.

Setting Up One-Time or Recurring Transfers

The screenshot shows a web interface for making a transfer. At the top, there is a navigation bar with 'Accounts', 'Zelle®', 'Payments', 'Transfers', and 'Apply for a Loan'. Below this is a 'Make a Transfer' form. The form has a title 'Make a Transfer' and a subtitle 'Manage Transfer Accounts'. It contains four main input fields: 'From' (a drop-down menu), 'To' (a drop-down menu), 'Amount' (a text input field with a dollar sign), and 'Schedule' (a drop-down menu). A 'Continue' button is at the bottom. Three red arrows with numbers 3, 3, and 4 point to the 'From', 'To', and 'Amount' fields respectively.

3. In the *From* drop-down menu, choose your account where the transfer will come from and in the *To* drop-down menu, choose the account where you'll be sending the transfer.
4. Populate the *Amount* field with the transfer amount.
5. In the *Schedule* drop-down menu, you can choose *Immediate (One Time)*, *Future (One Time)*, or *Recurring*.
 - If you only need a single transfer immediately, choose *Immediate (One Time)*, and skip to step 7.
 - If you only need a single transfer for a future date, choose *Future (One Time)*, populate the *Send On* date and skip to step 7.
 - If you choose *Recurring*, additional fields will be shown. See step 6 for details.

Setting Up One-Time or Recurring Transfers

Accounts ▾ Zelle@ Payments Transfers ▾ Apply for a Loan

Make a Transfer

Manage Transfer Accounts

From

To

Amount
\$

Schedule

Frequency

Start Date
MM/DD/YYYY

Duration

- If you are setting up a recurring transfer, you will have additional fields to populate.
 - Select how frequently you want the transfer to occur in the *Frequency* field.
 - Fill in the *Start Date* for the first desired transfer date.
 - In the *Duration* field, select *No end date*, *End by a specific date* (and populate desired date), or select *End after a specified number of transfers* (and populate desired number of transfers).
- Add details in the *Description* field to identify the transfer (optional).
- For Recurring or Future (One Time) transfers, if you would like, set up alerts for when/each time the transfer is completed, you can check the box next to *Send me an email when this transfer is complete*.
- Click the *Continue* button.

Setting Up One-Time or Recurring Transfers

10. You will see a summary of the transfer and will need to click *Transfer* button at bottom to complete transfer set up. To make changes, click *Edit Transfer* instead.

To view transfer activity and scheduled transfers once set up, click the *Transfers* menu and choose *Transfer Activity*. You can toggle between *Scheduled Transfers* and *Transfer History* there.

SETTING UP TRANSFERS IN THE MOBILE BANKING APP

1. Log into your mobile banking app and either simply click the *Transfers* icon at bottom or choose *Transfers* from top right menu and then select *Make a Transfer*.

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Southern Energy CREDIT UNION

Menu

Make a Transfer

Manage Transfer Accounts

From

To

Amount

Schedule

Continue

Accounts Zelle® Payments Transfers Deposits

2. In the *From Account* drop-down menu, choose your account where the transfer will come from and in the *To Account* drop-down menu, choose the account where you'll be sending the transfer.

3. Populate the *Amount* field with the transfer amount.

Setting Up One-Time or Recurring Transfers

- In the *Schedule* drop-down menu, you can choose *Immediate (One Time)*, *Future (One Time)*, or *Recurring*.
 - If you only need a single transfer immediately, choose *Immediate (One Time)*, and skip to step 6.
 - If you only need a single transfer for a future date, choose *Future (One Time)*, populate the *Send On* date and skip to step 6.
 - If you choose *Recurring*, additional fields will be shown. See step 5 for details.
- If you are setting up a recurring transfer, you will have additional fields to update.
 - Select how frequently you want the transfer to occur in the *Frequency* field.
 - Fill in the *Start Date* for the first desired transfer date.
 - In the *Duration* field, select *No end date*, *End by a specific date* (and populate desired date), or select *End after a specified number of transfers* (and populate desired number of transfers).

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Recurring

Frequency

5 Monthly

Start Date

5 MM/DD/YYYY

Duration

5 No end date

Description (Optional)

6

7 Send me an email when this transfer is completed

- Add details in the *Description* field to identify the transfer (optional).
- For Recurring or Future (One Time) transfers, if you would like, set up alerts for when/each time the transfer is completed, you can check the box next to *Send me an email when this transfer is complete*.
- Click the *Continue* button.

Setting Up One-Time or Recurring Transfers

9. You will see a summary of the transfer and will need to click *Transfer* button at bottom to complete transfer set up. To make changes, click *Edit Transfer* instead.

To view transfer activity and scheduled transfers once set up, click the *Transfers* menu and choose *Transfer Activity*. You can toggle between *Scheduled Transfers* and *Transfer History* there.