# XCEL Federal Credit Union

Did you know there is an easy way to add another XCEL member to your online banking account so you can easily transfer money to them? All you need to do is access Online Banking and just follow these easy steps.



## **ADD MEMBER TO MEMBER TRANSFER - STEP BY STEP**

Step 1

# Log into your online banking

Select Transfer & Payments then "Manage Accounts"



#### Step 2

## Click on Add Another Account right above "MEMBER TO MEMBER TRANSFER ACCOUNT"

| converts at Other Institut   | Prove and a second s  |                    |            |        |        |                                     |
|--|--|--------------------|------------|--------|--------|-------------------------------------|
| Routing #  | Account #  | Nickname *         | Credits    | Debits | Status | Action                              |
|  |  |                    | Yes        | No     | Active | Remove I Update                     |
|  |  |                    | Yes        | Yes    | Active | Remove I Update                     |
| mently have the ability  | to transfer funds among the accou  | ints listed below. |            |        |        | Add Another Account                 |
| mently have the ability  | to transfer funds among the account  | ints listed below. |            |        |        | Add Another Account                 |
| nently have the above  | to transfer funds among the account  | ints listed below. | Account 1  |        |        | Add Another Account  Action         |
| rrently have the ability of the solution of th | to transfer funds among the account of the second sec   | unts listed below. | Account 1  |        |        | Add Another Account Action Remove   |
| rrently have the ability<br>or to Memory Transfer<br>Nickname  | to transfer funds among the account  | ints listed below. | Account to |        |        | Add Another Account Action Betravet |
| erently have the ability of the second se  | to transfer funds among the account of XCEL (advect Device | unts listed below. | Account e  |        |        | Add Another Account                 |

#### **ADD MEMBER TO MEMBER TRANSFER - STEP BY STEP**

Step 3

Add the information of the member you will be transfering to and click "Submit"

| Add Member to Member Transfer Account                              |  |
|--|--|
| Presse provide us with the accordance indemnation requested below. |  |
| Nickzome   |  |
| * Member Namber  |  |
| *Last Name   |  |
| * Account Humber   |  |

### Once you have confirmed the entered information click "Confirm"

| Please confirm your Member to Member Transfer Account information. |                  |  |
|--|------------------|--|
|  | Nickname Mile    |  |
|  | Member Number    |  |
|  | Last Name        |  |
|  | Account Number 🧣 |  |
|  | Confirm Cancel   |  |

Step 5

#### You will receive the following message.

| You have succe | ssfully added folio | ving Member to Member Tr | ransfer Account. You can click he | re to Manage Accounts |
|----------------|---------------------|--------------------------|-----------------------------------|-----------------------|
|                | Nickname            | -                        |                                   |                       |
|                | Member Number       |                          |                                   |                       |
|                | Last Name           | adoreon.                 |                                   |                       |
|                | Account Number      | 9                        |                                   |                       |

#### Step 6

You have successfully added a member to your account and you can now transfer money to this member. Their account will be listed under the "To" drop down when Creating a Transfer.

| Create New Transfer                          |                                    |                    |
|--|------------------------------------|--------------------|
| Create Transfer<br>Transfer funds to another | account.                           | (*) Required Field |
| * From                                       | [Select an account]                |                    |
| * To   | Select an account                  |                    |
| Click  | Savings<br>Kasasa Saver            |                    |
| * Amount                                     | Checking                           |                    |
| Description                                  | My Accounts at Another Institution |                    |

Step 4