

How to Set-up Other Institution Accounts

 Sign-in your Online Banking (OLB), select "Other Institution" followed by "Add Account"

	Linked Accounts					
ACCOUNT INFORMATION	Current Bank Accounts					
Accounts Dashboard	Bank Name	Nic	kname	Account #	Туре	Status
↔ Transfer	There are currently no lin	ked bank accoun	S.			
1 Other Institutions	Add a New Account					
9 Open New Account	Add a New Account					
OD Purchase		Account Type:	- Select -	~ Choose		
🜲 Alerts and Messages			- Select Bank Account			

• Enter the other institution information as request:

Add a New Account		
dd a New Account		
Account Type:	Bank Account - Choose	
What's this page for? This is where you can lin ransfer from elsewhere to your account.	k to an account at another financial institution. Once linked, you may then make	B U.S. Check Sample
nstructions		(9 digits) (3-17 digits)
Step 1: Add an Account • Under Add a New Account select 'Bank • Complete all of the empty fields with the	Account' for Account Type. a correct information from your other financial institution. Then click the 'Add Ac	ccourt' button.
	nake two small deposits to your other financial institution account. Sick on 'Complete Verification'. Then enter the transaction amounts to complete	the setup.
Blep 3: Make a Transfer Once you've verified your account, you v	vill then see the option to make a transfer. For future payments after the initial s	etup—you will skip steps 1 and 2.
Please Note: Transfers need to be created bef	ore 1.00 PM Eastern Time to be processed on the next business day.	
MPORTANT: By completing the information b	elow, you authorize us to electronically debit/oredit your account at another fina	incial institution.
Bark Name		
Routing Number		
Account Number		
Re-enter Account Number		
Account Type	~	
Nickname		
	Add Account	

• The status on new account will show Unverified. Within a couple of business days, Alive CU will make two small deposits under \$1.00 to your other financial institution account. After that, come back to OLB and click on 'Complete Verification', enter the transaction amounts to complete the setup.

rrent Bank Acco	ounts				
ank Name	Nickname	Account #	Туре	Status	Options
ruist	Checking	XXXXXXXX	Checking	Unverified	Complete Verification Delete

• Once the trial deposit is entered the status on the new account will show Verified. Now it is ready for transfers between both accounts.

Linked Accounts						
current Bank Accoun Bank Name	ts Nickname	Account #	Туре	Status	Options	
Wells Fargo		XXXXXX	Checking	Verified	Delete	