

## GET STARTED GUIDE

# Moving Money



## Transfers within Forrit

**NOTE:** You will need to be registered for Online Banking in order to transfer money. See the "GET STARTED GUIDE: Online Banking" for details on registering for Online Banking in just a few quick steps.

1. To get started, visit [forritcu.org](http://forritcu.org) and log into Online Banking using your username and password.
2. Once logged in, navigate to "Move Money" on the main menu, and click on "Make or Schedule a Transfer".
3. Select the "From" account in the first dropdown, then the "To" account in the second dropdown. You can also choose if you'd like to have this transfer be made now, at a later date, or if you'd like it to be recurring.
4. Specify the amount you would like to transfer. If you'd like, you can enter a memo for the transaction as well. Click "Next."
5. Review your transfer details and click "Make Transfer" to finalize the transfer.

To transfer money to another Forrit CU member for the first time, you will need to add the member as a recipient:

1. Navigate to "Make or Schedule a Transfer" screen, then click "Add a recipient" to add a new account and fill out account information.
2. Then click "Verify Recipient".

Move Money + Add a recipient

From  
Select account ▼

To  
Select account ▼

Date  
03/18/2021  Repeat transfer

Amount  
\$ 0.00

Memo

From the "Move Money" tab in Online Banking, you can access many methods for transferring money.



## Mobile App Take Forrit on the go

Connect with us via our Mobile Banking App, available for your iPhone, iPad, and Android devices - we are available anywhere you are.



# Moving Money



## Institution to Institution


1. To get started, visit [forritcu.org](http://forritcu.org) and log into Online Banking using your username and password.
2. Once logged in, navigate to "Move Money" on the main menu, and click on "External Transfers".
3. Select "Transfer Between My Accounts".
4. Read through the Terms of Service. If you agree, click the box to accept the Terms of Service. Then click "Sign up now".
5. Click "Add a New Account" and fill out the account information. You will need to make sure you have the correct routing number and account number for the outside financial institution.  
NOTE: Access to your remote accounts is not immediately available. We will be making two small transactions (under \$1.00) into the account you are adding that you will be asked to verify. This process can take up to 3 business days; you will be notified by email when the transactions have been made.
6. Once you receive confirmation of these two deposits, access your account as instructed and click "Activate Now" to enter the two deposit amounts as instructed.

The remote account has now been successfully added and you can move money to it as you like.  
NOTE: transfers generally take 3 business days.

## Security PIN for external transfer


1. Upon scheduling the first transfer, the "Create New Security PIN" screen will appear.
2. Enter the required fields for identify verification.
3. Create a 4-character PIN. Your PIN must contain at least one letter and one number. Then create security questions and answers.
4. For every subsequent new transfer, you will need to verify your 4-character PIN

The remote account has now been successfully added and you can move money to it as you like.  
NOTE: transfers generally take 3 business days.



### Money Management

#### Budget made easy



Found within Online Banking and the Mobile App, you can: aggregate your accounts, track your spending and savings habits, manage your budget and set goals.

## FAQ

### What types of account can I add in external transfers?

You can add Checking, Savings, and Investment accounts

### Is there a maximum number of external accounts I can add?

You are allowed to add up to 5 external accounts.

### Can I delete and re-add the same account?

Yes, you can only delete and re-add the same account twice. A warning will display to customer at the 3rd deletion attempt.