

Steps to transfer money between accounts at your financial institution via the Business Mobile App:

1. Go to **Transfer** in the Business Mobile menu.
2. Select **“From”**
3. Eligible accounts display. If multiple Tax IDs are listed, select the **From Tax ID and account**.
4. Back on the Transfer screen, select **“To”**.
5. Eligible accounts display. If multiple Tax IDs are listed, select the **To Tax ID and account**.
6. Enter the **amount** and **memo** (optional).
7. Select **Transfer** and the success screen displays.

This screenshot shows the initial transfer screen. The 'From' field is empty. The 'To' field is empty. The 'Amount' field is empty. The 'Memo' field contains the text 'dinner, rent, etc. (optional)'. A 'Transfer' button is visible at the bottom.

This screenshot shows the 'Transfer From' selection screen. It lists the following accounts and balances:

Account Name	Balance
My Coffee Shop	
My Checking *7384	\$4,500.00
Joint Savings *7474	\$55,500.00
My Food Truck	
Personal Accounts	

This screenshot shows the 'Transfer To' selection screen. It lists the following accounts and balances:

Account Name	Balance
My Coffee Shop	
My Food Truck	
Personal Accounts	
My Checking *7384	\$4,500.00
Joint Savings *7474	\$55,500.00
Visa *4587	\$10,000.00
Mortgage Loan *2477	\$0.00

This screenshot shows the transfer screen with the 'From' and 'To' fields populated. The 'From' field shows 'Joint Savings \$55,500.00 My Coffee Shop'. The 'To' field shows 'My Checking \$4,500.00 Personal Accounts'. The 'Amount' field is populated with '\$5,000.00'. The 'Memo' field contains the text 'dinner, rent, etc. (optional)'. A 'Transfer' button is visible at the bottom.

Notes:

- Transfers are immediate. Go to Business Banking web to schedule future-dated or recurring transfers.
- Available balance must cover the transfer amount.
- OneView transfers, if enabled by your financial institution, allow *the Primary Admin only* to move money between business and personal accounts.
- Transfers that **must be supported by the FI host** to work:
 - Cross-TIN transfers
 - Transfers from business deposit account to business loan
 - Transfers from personal deposit account to business loan
 - Transfers from business deposit account to personal loan