

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.

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