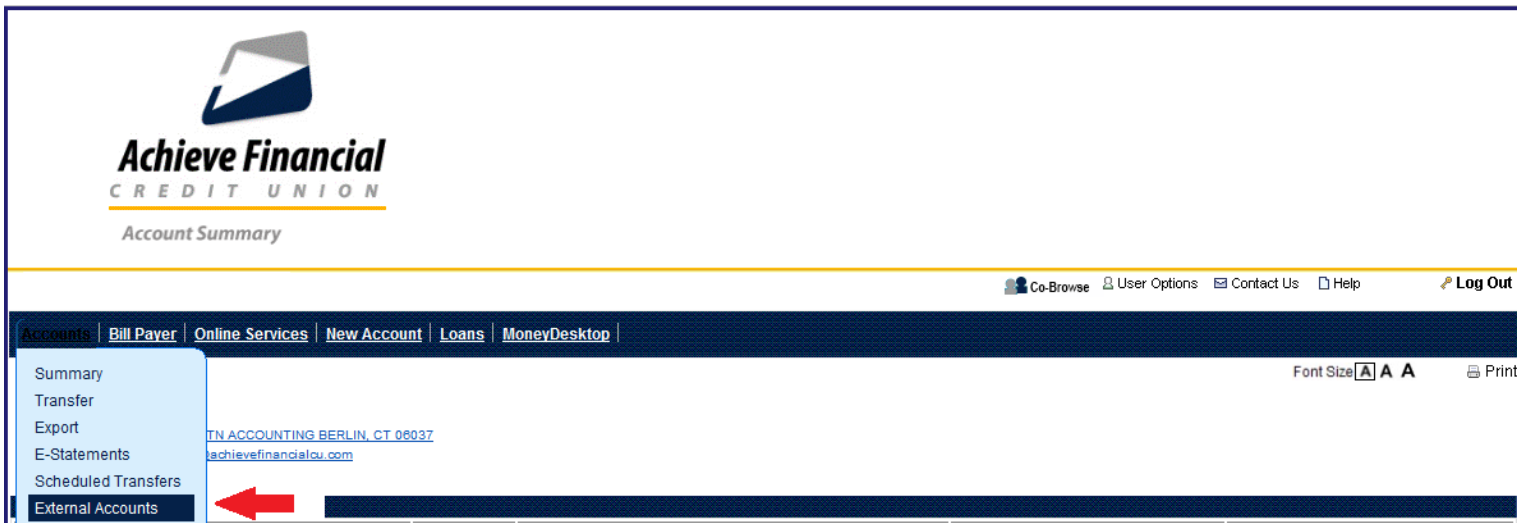


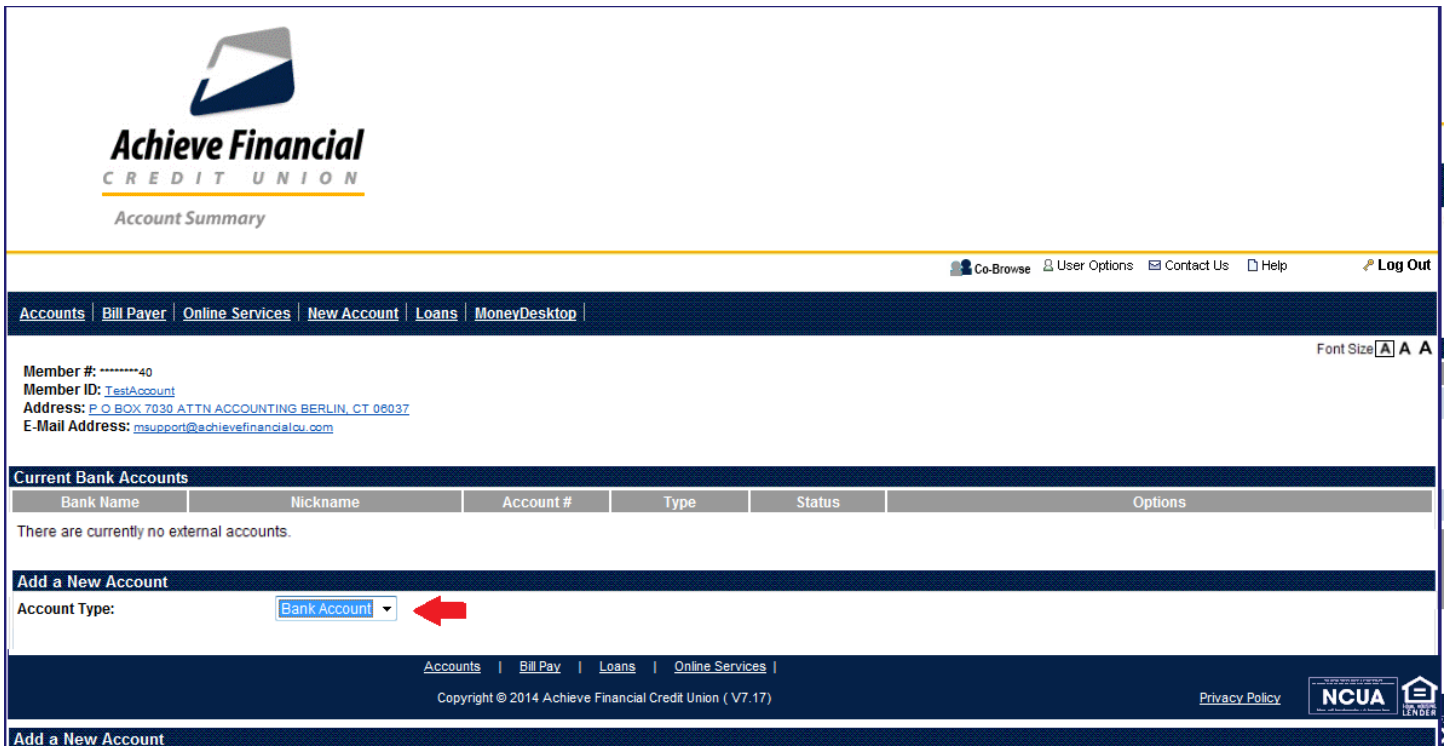
How to Link an External Account

1) From the Accounts Menu select **External Accounts**.



The screenshot shows the Achieve Financial Credit Union Account Summary page. The header includes the logo and 'Account Summary'. The navigation bar has links for Accounts, Bill Payer, Online Services, New Account, Loans, and MoneyDesktop. The 'Accounts' menu is open, showing options like Summary, Transfer, Export, E-Statements, Scheduled Transfers, and External Accounts. A red arrow points to 'External Accounts'. The right side of the page has links for Co-Browse, User Options, Contact Us, Help, and Log Out, along with font size controls and a print button.

2) Under the **Add a New Account** section click the drop down box to select **Bank Account**.




The screenshot shows the Achieve Financial Credit Union Account Summary page. The header includes the logo and 'Account Summary'. The navigation bar has links for Accounts, Bill Payer, Online Services, New Account, Loans, and MoneyDesktop. The 'Accounts' menu is open, showing options like Summary, Transfer, Export, E-Statements, Scheduled Transfers, and External Accounts. A red arrow points to 'External Accounts'. The right side of the page has links for Co-Browse, User Options, Contact Us, Help, and Log Out, along with font size controls and a print button.

Member #: *****40
Member ID: [TestAccount](#)
Address: [P O BOX 7030 ATTN ACCOUNTING BERLIN, CT 06037](#)
E-Mail Address: [msupport@achievefinancialou.com](#)

Current Bank Accounts


Bank Name	Nickname	Account #	Type	Status	Options
There are currently no external accounts.					

Add a New Account

Account Type: Bank Account 

Accounts | Bill Pay | Loans | Online Services |

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Privacy Policy 

3) Enter the information for the external account you would like to add then click **Add Account**.

Add a New Account

Account Type: Bank Account

U.S. Check Sample

⑆211554485⑆00121456789010⑈

Routing Number (9 digits)Account Number (3-17 digits)

Bank Name:

Routing Number:

Account Number:

Re-enter Account Number:

Account Type:

Nickname:

Add Account

External Account Transfer Service

Use this screen to link accounts that you have at other financial institutions. After you have completed the enrollment steps below, you may perform electronic transfers between your accounts here at the credit union and your accounts at another financial institution.

Instructions

Step 1: Add an Account

- Complete all of the fields shown with the correct information from your other financial institution.
- Click the 'Add Account' button.

Step 2: Verify Your Account

- Within 2 – 3 business days, you will see two small deposits to the account you are now linking.
- When you see those amounts, return to the External Accounts page. Click on 'Complete Verification', and enter the transaction amounts to complete the setup.


Step 3: Make a Transfer

- After you have completed Steps 1 and 2, you will see your external account listed in the Transfer menu. You may now make transfers to and from your linked account!
- Perform Steps 1 through 3 for each additional account you wish to link.

[Accounts](#) | [Bill Pay](#) | [Loans](#) | [Online Services](#)

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4) The **Completing Verification** instructions will appear.

5) Verify that your account information is correct and click **Confirm**.

Confirm New Linked Account

Completing Verification:

- In 2 – 3 business days two (2) small deposits will be made to your external account. You will also see one (1) withdrawal totaling those two deposits.
- Review your external account until you see the two (2) small deposits post.
- When you have the amounts deposited, return to your Achieve online banking to complete the verification process by accessing External Accounts.

Bank Name: Test Bank

Routing Number:

Account Number: 00000001

Bank Account Type: Checking

Nickname: My External Checking

[Cancel](#) [Confirm](#)