



## Transacting with another Financial Institution (FI2FI)

### How do I link an account from another financial institution?

You can easily link accounts from other financial institutions inside your Online Banking.

To link an external account:

- Log In
- Navigate to the Accounts section
- Select *Add an External Transfer Account* in the right menu **or** tap the + in the top right corner in Mobile



Add an external transfer account

Add an account from another financial institution to make transfers with.

- Input all information for the external account and click *Submit*

< Add external account

Account name	Enter
Routing no. ⓘ	Enter
Account no. ⓘ	Enter
Account type	Select >

Submit

- You will receive a confirmation that deposits are being sent.



Deposits sent

You will receive 2 microdeposits at your other financial institution and you will need to verify them in Freedom's Online Banking to complete the account link. You will also receive an email notice that the transfer account process has been initiated. It can take 1-3 business days for the deposits to appear.

- Once you receive the test deposits, you will need enter the test deposit amounts into the Online Banking platform to complete the verification process.

- Choose **Transfers** from the menu
- Then click **External Accounts**

Transfers

+ External account

Scheduled **External accounts**

- Choose the account you want to verify
- Enter each test deposit amount in the fields provided and click **Confirm**

We've sent two small deposits to verify your account. When they arrive in 1-3 business days you'll need to confirm the amounts. By confirming these deposits you acknowledge you have legal access to this account. You have until \_\_\_\_\_ to confirm the deposit amounts.

\$

0.00

\$

0.00

Confirm

Remove account

- The following message will display when you have successfully completed verification



You're ready to transfer!

You can now transfer with this account. This account's transfers may take 1-3 business days to process.

Close

Make a transfer

## How do I set up a new transfer to or from a linked external account?

You can make transfers between your Freedom accounts and other financial institutions once an external account has been verified.

Once the external account is linked:

- From the Dashboard, the left-hand menu, or from within a specific account click **Transfers** > **Make a Transfer**
- Select your **From** and **To** account/loan and amount
- Click **More Options** to change the frequency and date if desired
- Click **Submit**

**Please note:** Transfers to and from another financial institution may take 1-3 business days to process.