

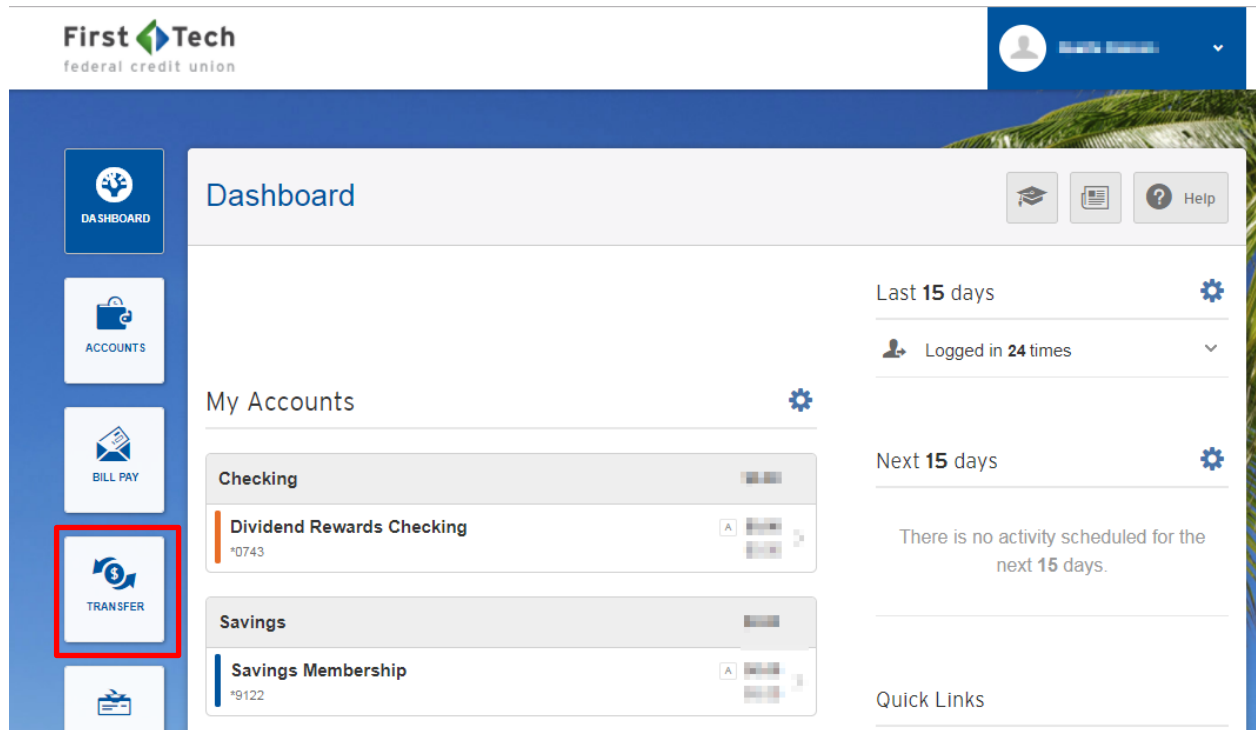


STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

The following step-by-step guide was developed to assist you in adding an external account to your First Tech Online Banking. If you have any questions, please contact us at 855.855.8805.

- 1) Log in to First Tech Online Banking and select "TRANSFER":





STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

2) Under “Add Account,” choose “at another bank” in the dropdown menu:

The screenshot shows the First Tech online banking interface. The main heading is "Transfer" with tabs for "Classic", "Scheduled", and "History". The "Classic" tab is selected. The "Transfer Details" section includes fields for "From Account", "To Account", "Amount", "Date", "Frequency", and "Reason". The "To Account" dropdown menu is open, showing "Add Account" (highlighted with a red box), "at First Tech Federal Credit Union", and "at another bank". The "Transfer Confirmation" section shows "From Account" and "To Account" as "None Selected", "Amount" as "\$0.00", "Occurs" as "One Time", and "On" as "8/24/2017". A "Confirm Transfer" button is visible at the bottom right of the confirmation section. A sidebar on the left contains navigation icons for Dashboard, Accounts, Bill Pay, Transfer, Deposit, and More... The top right corner shows a user profile for "Kaitlin [Last Name]".



STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

3) Type in your external account information:

The screenshot shows the First Tech online banking interface with a modal window titled "Add Account at another bank". The modal contains the following fields and options:

- Account Type:** A dropdown menu with "Checking" selected.
- Routing Number:** A text input field containing "314074269". Below the field, it says "USAA FEDERAL SAVINGS BANK".
- Account Number:** A text input field with masked characters.
- Confirm Account Number:** A text input field with masked characters.
- Nickname:** A text input field with a question mark icon and the text "USAA".

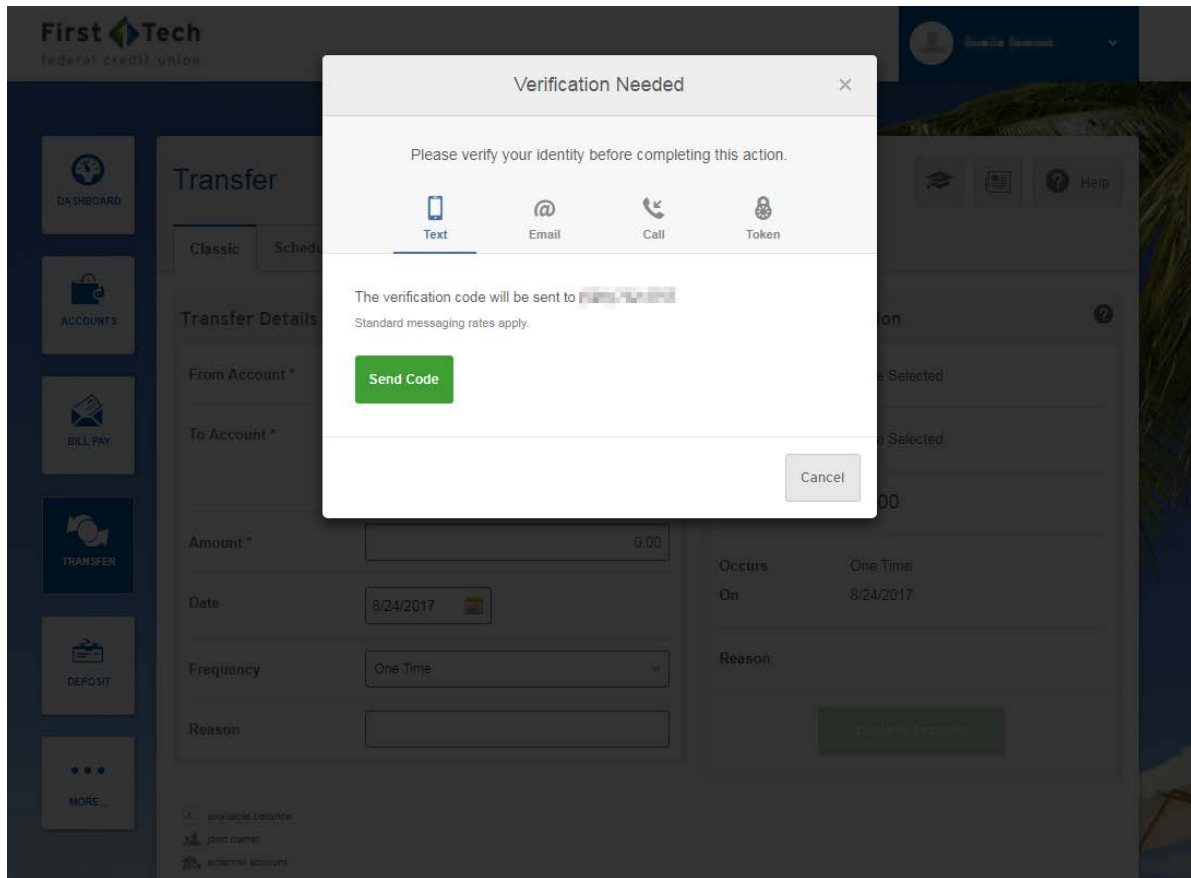
At the bottom right of the modal, there are two buttons: "Cancel" and "Save".



STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

- 4) After you fill out each field, you will be asked to verify your identity via a text message, an email, a phone call, or a token. Choose a channel, then you'll receive a code:

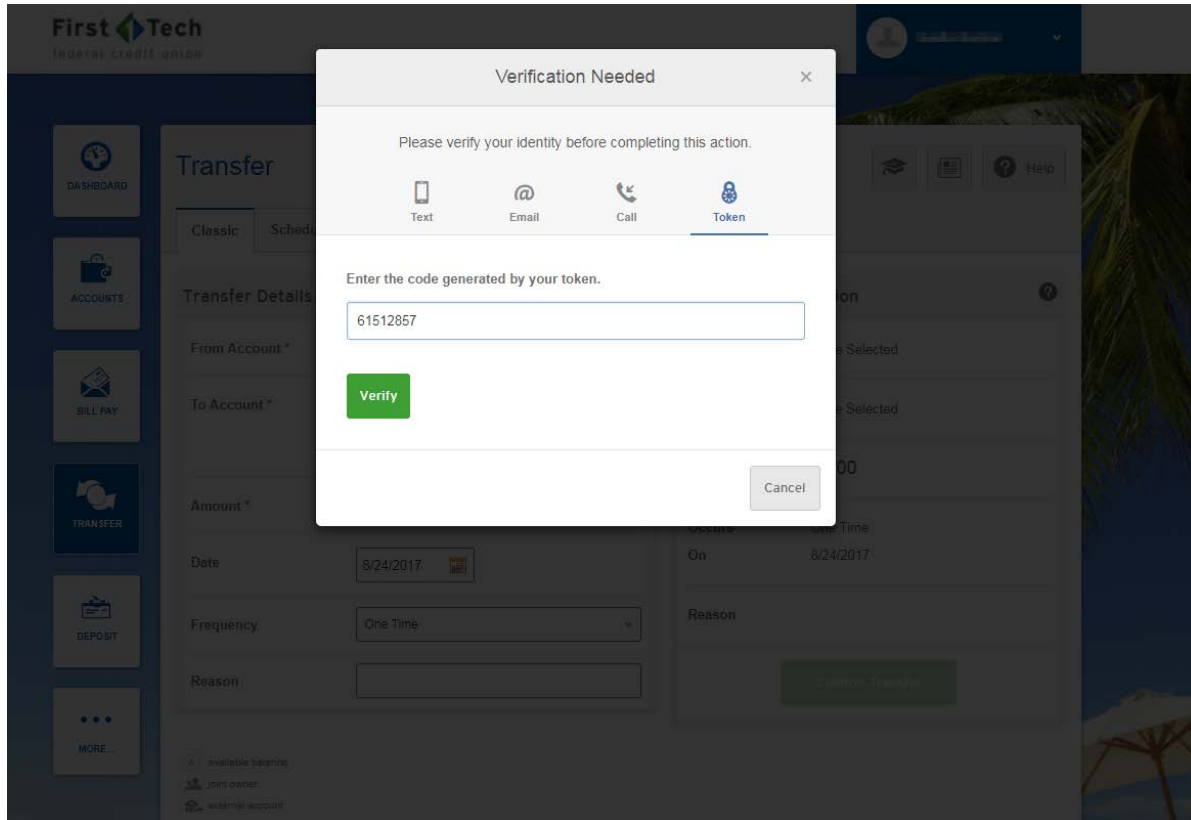




STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

5) In the example below, the user has selected “Token” to receive an identity verification code:

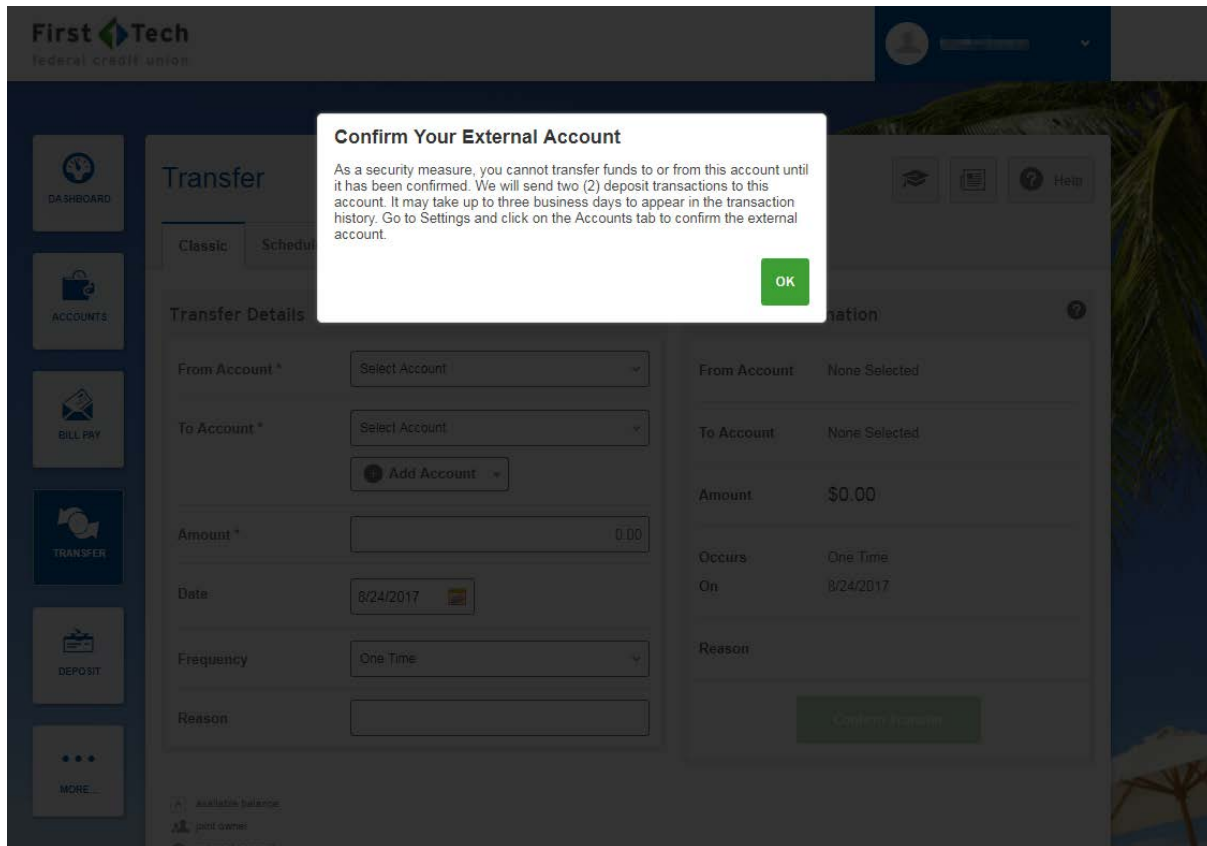




STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

- 6) Confirm that your external account belongs to you by entering the two deposit transactions First Tech sends to your external account (Note: This process may take up to three business days):





STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

- 7) Once the deposit transactions are posted to your external account, go to "Settings" in your First Tech Online Banking again:

First Tech
federal credit union

Transfer

Classic | Scheduled | History

Transfer Details

From Account *

To Account *

Amount *

Date

Frequency

Reason

Transfer Confirmation

From Account None Selected

To Account None Selected

Amount \$0.00

Occurs On One Time 8/24/2017

Reason

Messages

Settings

Log Out

available balance

joint owner



STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

- 8) Under the “Accounts” tab, scroll to the bottom of the page to find the “pending” external account(s) you have recently added but still need(s) to be confirmed:

The screenshot shows the 'Settings' page with the 'Accounts' tab selected. The 'ACH Accounts' section contains the following data:

Account Type	Account Name	Account Number	External	Status	Actions
Savings Membership	Savings — *9122		Primary Owner		Edit
Savings	Savings — *6586		Cross Account		Edit
Savings	Savings — *2262		Cross Account		Edit
Credit Card					
Credit Card	Credit Card — *6391		Joint Owner		Edit
ACH Accounts Reorder Accounts					
ACH Checkings	ACH Checkings — *0957		External	OPEN	Edit Delete
ACH Checkings	ACH Checkings — *0417		External	PENDING	Confirm Edit Delete
USAA ACH Savings	USAA ACH Savings — *0409		External	PENDING	Confirm Edit Delete



STEP-BY-STEP GUIDE: Online Banking

Adding an External Account

- 9) Enter the two deposit amounts (“Trial Transfers”) that show up in your external account’s transaction history and click “Confirm.” This step completes the process:

