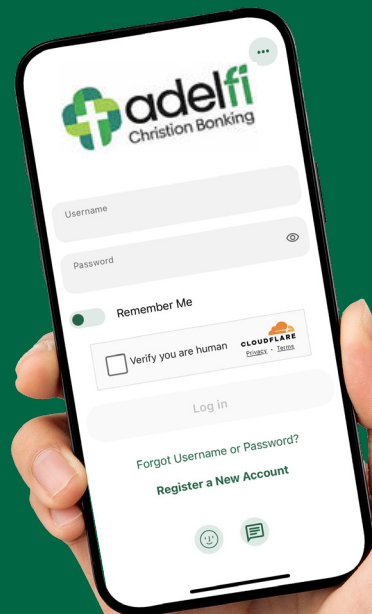


AdelFi's Online Banking User Guide: Pay & Transfer



Welcome to the AdelFi Online Banking User Guide!

We're excited to introduce our upgraded online banking platform, designed to enhance your digital banking experience. Our goal is to provide you with a convenient, user-friendly environment that allows you to manage your personal and business finances anytime, anywhere.

This guide will help answer your questions as you navigate our new banking platform. Thank you for being a part of the AdelFi community!





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Standard One-time or Recurring Transfers

Standard transfers allow you to perform both one-time and recurring transfers, as well as loan payments.

1. **Select the Transfer Type.**
2. **Choose the Source Account** from the “From” dropdown menu.
3. **Select the Destination Account** from the “To” dropdown menu.
4. **Enter the Amount** you want to transfer.
5. **Choose the Date** (or Start Date) for the transfer.
6. **Select the Frequency** for how often the transfer will repeat. If prompted, choose the Ending Date for the recurring transfer based on your selected frequency. You can also add a memo (optional).
7. **Click the Review Transfer Button.**
8. **A Review Transfer window will display, allowing you to either edit or submit the transfer.**

You can set up transfers or payments to move funds between accounts that you own (i.e. primary or joint ownership). Using the “Frequency” dropdown, you can create any of the following twelve transfer scenarios:

- One Time
- Daily
- Weekly
- Biweekly
- Monthly
- End of Month
- Semi Monthly
- Every Other Month
- Every Four Weeks
- Quarterly
- Every Six Months
- Yearly

Memo for Transfers

An optional memo can be added to any transfer. This can be used to enter specific information about the transfer that you may want to record for future reference. This information will be stored and displayed for reference purposes in the **Scheduled** and **Activity** tab (Activity tab on mobile) under the transfer detail, and in the **Monthly Statements**.