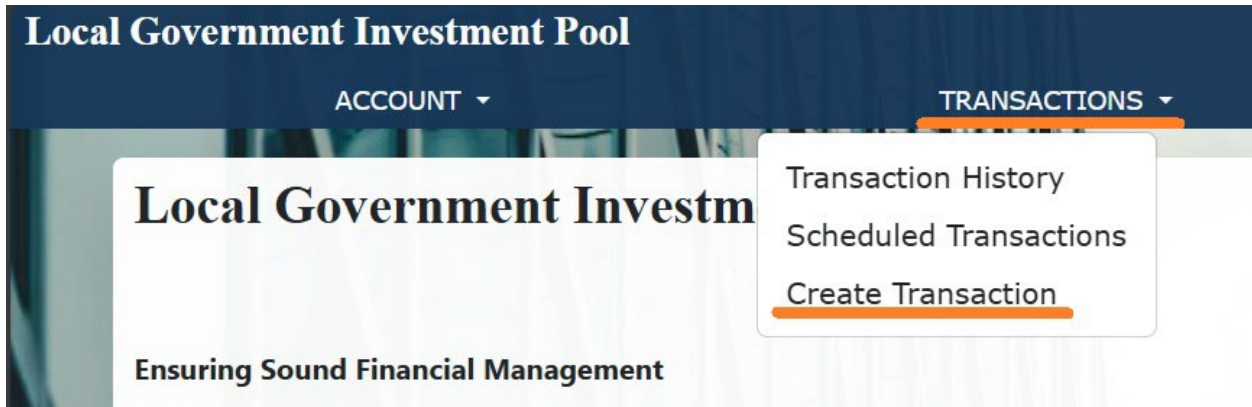
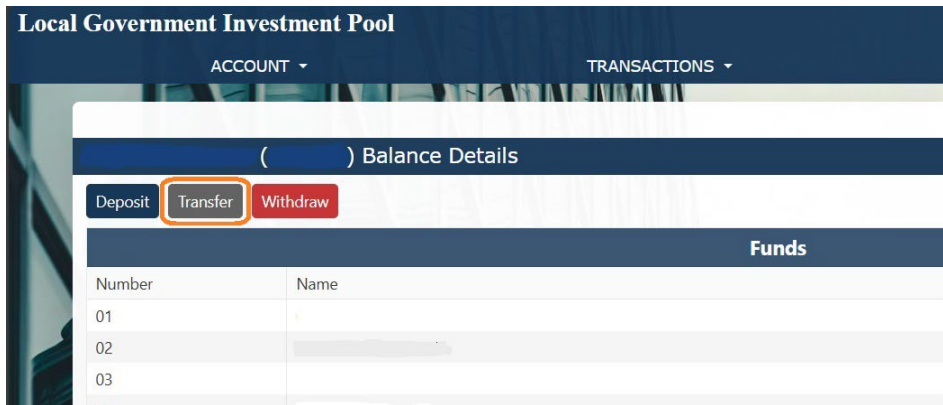


**Transfer Steps:**

1. Click on the “Transactions” tab at the top of the screen. Then click “Create Transaction”:



2. Click on “Transfer” to go the Schedule Deposit:



3. On the Transfer Transaction Details menu on the right of the screen, select the sub-account that you would like to transfer funds from:

The screenshot shows the 'Transfer Transaction Details' form. The 'From' dropdown menu is highlighted with an orange border. The form includes fields for 'To', 'Amount', 'Effective Date', and 'Memo'. The 'Effective Date' is set to 4/10/2026. At the bottom of the form, there are 'Cancel' and 'Save' buttons.

4. Select the sub-account that you would like the funds to be transferred to.

**Transfer Transaction Details**

From  
Select Fund... ▼

To  
Select Fund... ▼

Amount  
[ ] ▲▼

Effective Date  
4/10/2026 [📅]

Memo  
[ ]

Cancel Save

5. Enter the amount you would like to transfer.

**Transfer Transaction Details**

From  
Select Fund... ▼

To  
Select Fund... ▼

Amount  
[ ] ▲▼

Effective Date  
4/10/2026 [📅]

Memo  
[ ]

Cancel Save

6. Enter the date that you would like the funds to be transferred.

**Transfer Transaction Details**

From  
Select Fund... ▼

To  
Select Fund... ▼

Amount  
[Empty field with up/down arrows]

Effective Date  
4/10/2026 [Calendar icon]

Memo  
[Empty text area]

Cancel Save

7. You may place a memo for your own notes regarding the transaction. However, a memo is not required.

**Transfer Transaction Details**

From  
Select Fund... ▼

To  
Select Fund... ▼

Amount  
[Empty field with up/down arrows]

Effective Date  
4/10/2026 [Calendar icon]

Memo  
[Empty text area]

Cancel Save

8. Select the "Save" button. This will finalize your withdrawal request.

### Transfer Transaction Details

**From**  
Select Fund... ▼

**To**  
Select Fund... ▼

**Amount**  
 ▲ ▼

**Effective Date**  
4/10/2026 📅

**Memo**