



Setting Up External Accounts

Transfer money to and from your accounts, even those at other credit unions and banks. To transfer money to another financial institution, you must first link your external account to your Achieve account.

How to Link External Accounts:

- Login to your Online Banking account
- Click the downward facing arrow next to your name and choose **Settings**.
- From the Settings page, click on the **Accounts** tab.
- Click the option to **Link an External Account**.
- Review Achieve Financial's *ACH Transfer Policy* and click **I Agree**.
- Next, you will need to add the account information from another credit union or bank. You will need the **Account Type, Routing Number, Account Number** and *optional Nickname*.

Verifying Your Account

- Verification is required. A verification code can be sent via **text, email or phone call**.
- You will then need to confirm your external account. Achieve Financial will send two deposit transactions to this account. This may take up to three business days.
- Once deposits have been received, go to **Settings** and click on the **Accounts** tab to confirm the external account.
- Once confirmed you will see the external account(s) listed at the bottom of your account dashboard under a section labeled "**ACH Accounts**".
- You will now be able to transfer funds to your external account.

For assistance, please contact the Call Center during regular business hours at **860-828-2790, Option 5**.