

CHASE CONNECT[®] USER GUIDE

Account Transfer



Transfer Between Accounts

Easily move money between your Chase accounts, or between your accounts with us and those you have at other financial institutions.¹



¹ Fees, terms, conditions and limitations apply as described in the legal agreement that applies to your online service.

The screenshot shows the JPMorgan Chase mobile app interface. At the top, there's a navigation bar with a menu icon, a notification badge with '5', and the text 'Explore products'. Below this is a secondary navigation bar with tabs: 'Accounts', 'Pay & transfer' (selected), 'Deposit checks', and 'Account management'. On the left, a list of accounts is shown, including 'YALE VISION' and 'BANK ACCOUNT'. A dropdown menu is open under 'Pay & transfer', showing options like 'Pending approvals', 'Pay bills', 'Transfer money' (marked with a red circle '1'), 'Wire money', 'Repeating wires', 'Payment activity', and 'Merchant Services'. A callout box points to the 'Transfer money' option, stating: 'Choose **Transfer money** from the Pay & Transfer drop-down list or simply click the button displayed under balance information.' To the right, the 'Balance' section shows 'Available credit: \$0.00' and 'Available plus credit: \$2,058,968.48'. Below this, there's a 'Paperless' button and a 'Transfer money' button (marked with a red circle '2'). Further down, there's a section for 'UNCOLLECTED FUNDS' and a table of transactions.

Date	Description	Amount	Balance
Jan 4, 2017	Online Transfer to CHK ...3241 transaction#: 2522417472 01/03 Account transfer	-\$200.00	\$2,058,968.48
Dec 30, 2016	INTEREST PAYMENT Misc. credit	\$10.67	\$2,059,168.48

☰

5

Explore products ▾

🔍

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Sign out

Accounts

Pay & transfer

Deposit checks

Account management

Transfer money

Schedule transfer

Transfer activity

External accounts

Transfer from

Checking (...7035): \$17,907.98 ▾

Transfer to

Checking (...3241): \$25,200.00 ▾

Amount

\$

Transfer date

03/20/2017

Memo (optional)

Use letters & numbers only (up to 32 characters).

Set up repeating transfers ☐ Off

3

Cancel

4 Next

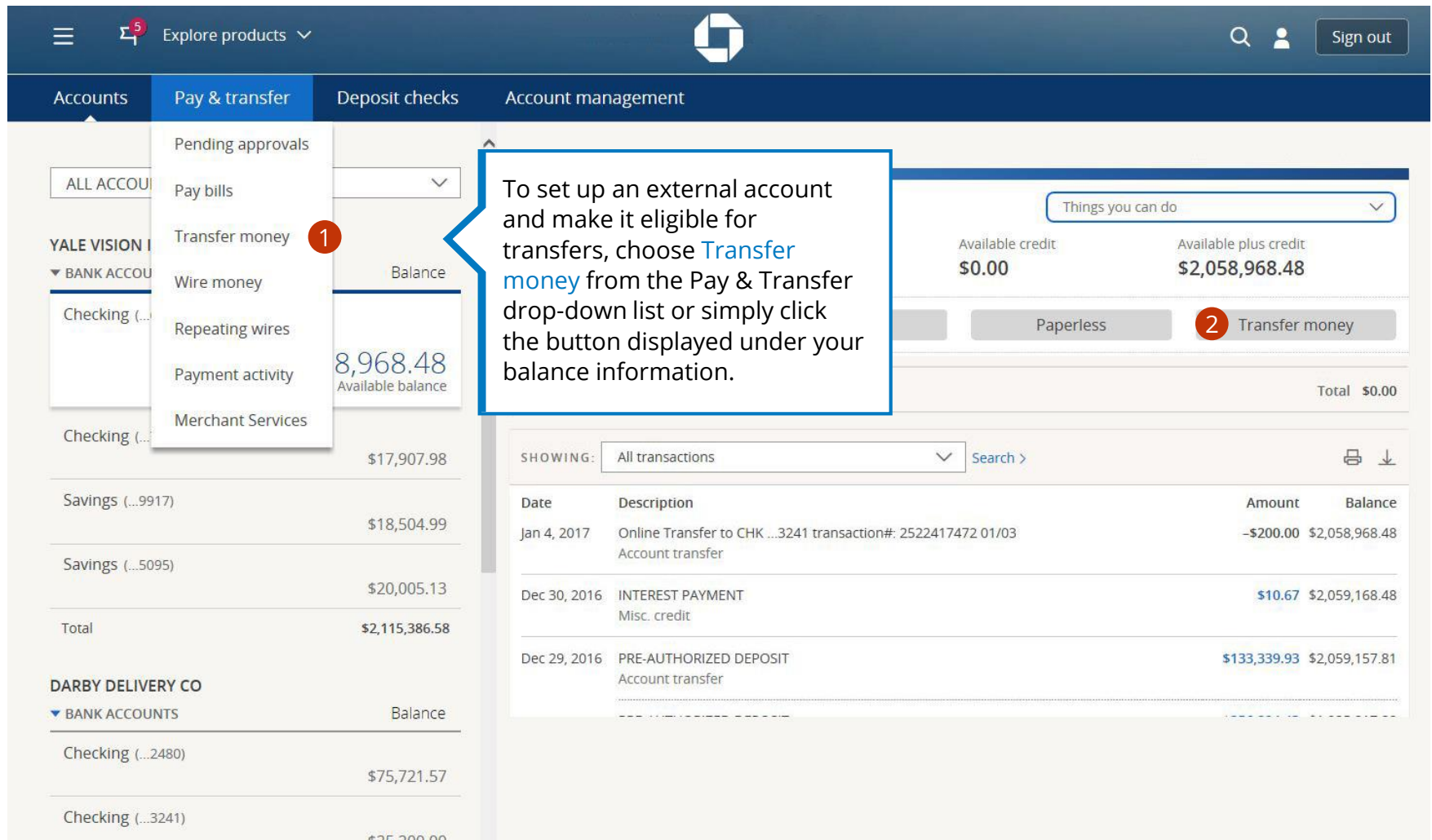
You can choose to make this a [repeating transfer](#) by toggling the repeating transfer button.

Using the drop-down lists, tell us which accounts you'd like to transfer between. Then, tell us the amount, date and memo (optional). If this is a one-time transfer, click [Next](#).

Add An External Account



Simplify your external transfers by adding an external account. Only the system administrator can add external accounts.








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Date	Description	Amount	Balance
Jan 4, 2017	Online Transfer to CHK ...3241 transaction#: 2522417472 01/03 Account transfer	-\$200.00	\$2,058,968.48
Dec 30, 2016	INTEREST PAYMENT Misc. credit	\$10.67	\$2,059,168.48
Dec 29, 2016	PRE-AUTHORIZED DEPOSIT Account transfer	\$133,339.93	\$2,059,157.81

 Explore products ▾



 Sign out


AccountsPay & transferDeposit checksAccount management

Transfer moneySchedule transferTransfer activityExternal accounts 3

Transfer from
Checking (...7035): \$17,907.98 ▾

Transfer to
Checking (...3241): \$25,200.00 ▾

Amount
\$

Transfer date
03/20/2017 

Memo (optional)




Use letters & numbers only (up to 32 characters).


Set up repeating transfers ☐ Off



CancelNext

Checking (...7035) Transfer Activity

Choose External accounts from the Transfer money menu.

  Explore products 



  [Sign out](#)

AccountsPay & transferDeposit checksAccount management

Transfer moneySchedule transferTransfer activityExternal accounts

EXTERNAL ACCOUNTS

See/edit external accounts

Add external account **4**

To add an external (or non-Chase) account, look at a check from that account and enter your routing number, account number and other information below.


Routing number


Account number

Type

Checking

Purpose

Personal

You may edit or shorten the bank name.

CancelNext

If you have existing external accounts, we'll list them here. If not, you'll see a button to [Add external account](#). Here, you'll provide your financial institution from outside institutions:

- Routing number
- Account number
- Account type
- Account purpose
- Bank name (we'll fill it in based on the routing number, but you can change it)
- Account nickname (how we'll label it in your account list)

Transfer money | Schedule transfer | Transfer activity | **External accounts**

EXTERNAL ACCOUNTS

See/edit external accounts

Add external account

You can verify your external account in one of two ways. We can verify your access immediately if you let us log in to your account at the other bank. Please note: We do not keep or share your login and password. Or, we can make two trial deposits to your external account and ask you to verify the amounts in a couple of days.

Which option do you prefer:

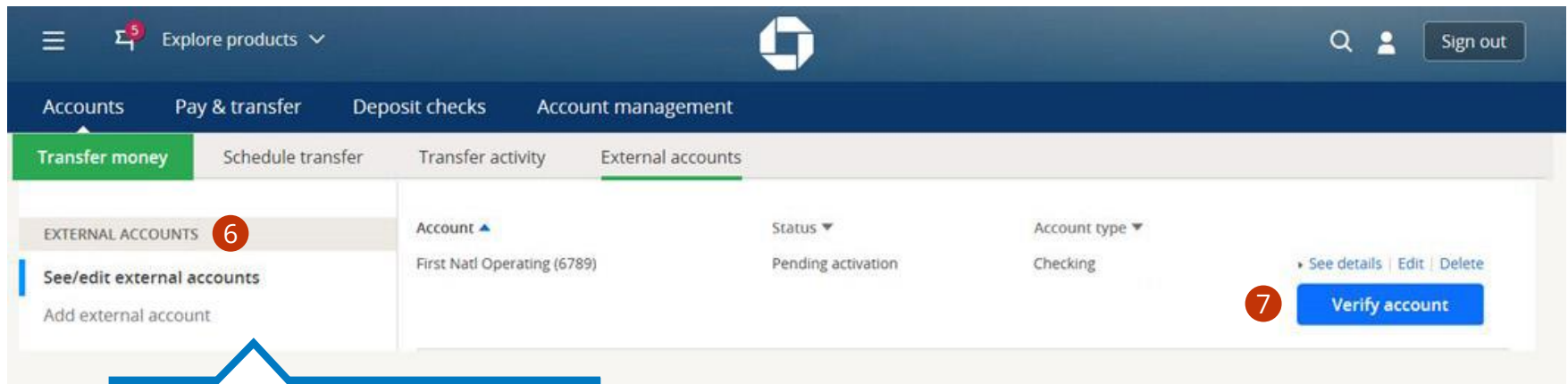
☐ Verify now by entering your other bank's login and password.

☐ **5** Verify in 2-3 days by receiving trial deposits.

Back | Cancel | Next

Depending on the information provided, you may have the option to verify your account instantly with your username and password, or we will verify by depositing two small deposits into the account, which you'll need to verify.

If you verify instantly, your external account will appear in the drop-down list.



EXTERNAL ACCOUNTS 6

See/edit external accounts

Add external account

Account ▲	Status ▼	Account type ▼	
First Natl Operating (6789)	Pending activation	Checking	See details Edit Delete

7 Verify account

If you choose trial deposits, you'll see your account when you choose [External accounts](#) from the Accounts menu, but you still need to [verify](#).

Double check your external account activity and be sure to write down the two amounts from "JP Morgan Chase Trial Dep," because you'll need them on the next screen.

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5

Explore products ▾

🔍

👤

Sign out

Accounts

Pay & transfer

Deposit checks

Account management

Transfer money

Schedule transfer

Transfer activity

External accounts

EXTERNAL ACCOUNTS

See/edit external accounts

Add external account

Account ▲	Status ▼	Account type ▼
First Natl Operating (6789)	Pending activation	Checking

1. Make sure you have reviewed recent activity for your First National Bank and Trust Company account ending in 6789

2. You should have received two deposits of less than \$0.50 each from "JP Morgan Chase Trial Dep."

3. Enter the two amounts: \$0. and \$0.

Cancel

8 Submit

Please tell us the two amounts and click [Submit](#).

See Transfer Activity



Transfer Between
Accounts

Add An External
Account

See Transfer
Activity



The screenshot displays the JPMorgan Chase mobile app interface. At the top, there's a navigation bar with a menu icon, a notification badge with the number 5, and the text "Explore products". Below this is a secondary navigation bar with tabs: "Accounts", "Pay & transfer", "Deposit checks", and "Account management".

The main content area is divided into two sections. The left section, titled "YALE VISION INC", shows a list of bank accounts with their balances. The right section, titled "Checking (...6268)", shows the account details and a list of transactions.

A callout box with a blue border and a blue arrow points to the "Things you can do" dropdown menu in the right section. The text inside the callout box reads: "From any checking or savings account, go to [Things you can do](#) and choose [Transfer activity](#)."

The "Things you can do" dropdown menu is open, showing the following options:

- Account details
- Account & routing number (PDF)
- Transfer activity (2)
- Statements & documents
- Account services
- Order checks & deposit slips
- Stop payment on a check
- Update settings & preferences

The transaction list in the right section shows the following transactions:

Date	Description	Amount	Balance
Jan 4, 2017	Online Transfer to CHK ...3241 transaction#: 2522417472 01/03 Account transfer		
Dec 30, 2016	INTEREST PAYMENT Misc. credit	\$10.67	\$2,059,168.48
Dec 29, 2016	PRE-AUTHORIZED DEPOSIT Account transfer	\$133,339.93	\$2,059,157.81
	PRE-AUTHORIZED DEPOSIT Account transfer	\$256,894.43	\$1,925,817.88
Nov 30, 2016	INTEREST PAYMENT Misc. credit	\$68.09	\$1,668,923.45

Explore products ▾

Sign out

AccountsPay & transferDeposit checksAccount management

Payment activitySummary

APPROVALS

Pending approvals

MY CHASE PAYMENTS (PENDING/PAST)

Credit cards

Automatic payments

BILL PAY (PENDING/PAST)

All bill pay activity

Repeating payments

TRANSFERS

FILTER BY Choose one ▾

Transfer money >

Transfers will be listed beginning with the most recent. Sort using any of the columns to organize by status, originating account, destination account or amount. You can also [filter](#) by only the transactions you'd like to see.

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