

Internal Transfers

The **Internal Transfers** feature allows you to move money from your account to another internal account at Walden. You can use this feature to send money to one of your other business or personal accounts at Walden. This feature does not allow you to pull money in from another Walden account; only send to another Walden account.

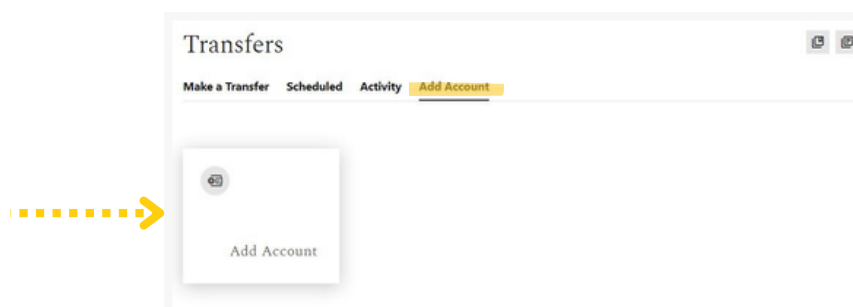
The screenshot shows the 'Transfers' interface with the following sections:

- Transfers** (Title)
- Navigation tabs: **Make a Transfer**, **Scheduled**, **Activity**, **Add Account**
- Accounts** section:
 - From Account: [Dropdown]
 - To Account: [Dropdown]
- How Much** section:
 - Amount: [Input field]
- When** section:
 - Frequency: [Dropdown] (One Time)
 - Date: [Input field] (09-15-2025)
- Memo** section:
 - Description (Optional): [Text area]
- Footer text: Interested in transferring more than your current limit? Call us at (603) 227-6801 to discuss a limit increase. You can also review our [Transfer Policy and Limits](#)
- Review Transfer button

NOTE: In order to make internal transfers, users need to have the **Internal Transfers** permission under **Payment Permissions** and authorization to use the relevant accounts under **Account Access**. For more information about how to edit a user's permissions, see our User User Guide.

ADD ACCOUNT

To add an internal account, go to **Money Movement** → **Internal Transfers** → **Add Account**.



Enter the **Last Name** of an account signer and **Account Number** of the internal Walden account. Place a checkmark to **Save Account for Future Use** and enter a **Nickname** for the account.

Send money to another Walden Mutual Bank member

Internal accounts are within your current financial institution. We will send an email to the recipient, notifying them of this connection.

Recipient information

Last Name
Tortellini

Account details

Verification method
Account

Account Number

Save Account For Future Use

Nickname
Tortellini

Save

Click **Save** then **Send Code** to your preferred verification method.

Confirm your identity

Please verify your identity before completing this action.

Email **Call**

The verification code will be emailed to mf***n@waldenmutual.com.

Send Code

Cancel

After entering your verification code, you end up on a success screen that confirms that your new internal Walden account has been added.

Send money to another Walden Mutual Bank member

Success

MAKE A TRANSFER

Once the internal account has been added and permissions have been granted to a user to make a transfer, go to **Money Movement**→ **Internal Transfers**→ **Make a Transfer**.

Transfers

Make a Transfer | Scheduled | Activity | Add Account

Accounts

From Account To Account

How Much

Amount *

When

Frequency Date *

One Time 09-15-2025

Memo

Description (Optional)

Interested in transferring more than your current limit? Call us at (603) 227-6801 to discuss a limit increase. You can also review our [Transfer Policy and Limits](#)

Review Transfer

Select the **From Account**, **To Account**, **Frequency**, **Date** and enter the **Amount**. You can also enter a memo or description of the transfer for your records.

Transfers

Make a Transfer | Scheduled | Activity | Add Account

Accounts

From Account To Account

Spend Local Business \$0.01 Tortellini

How Much

Amount *

\$0.01

When

Frequency Date *

One Time 09-25-2025

Memo

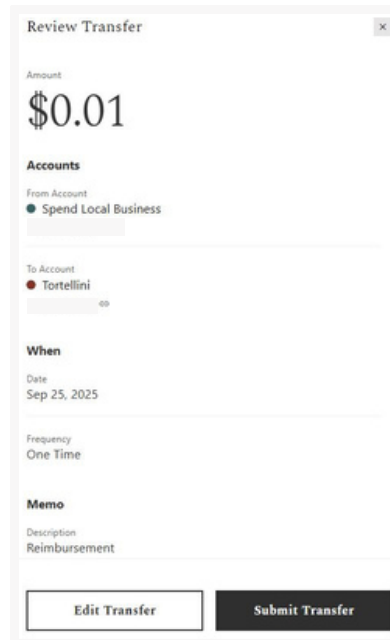
Description (Optional)

Reimbursement 13 / 20

Interested in transferring more than your current limit? Call us at (603) 227-6801 to discuss a limit increase. You can also review our [Transfer Policy and Limits](#)

Review Transfer

Click **Review Transfer**.

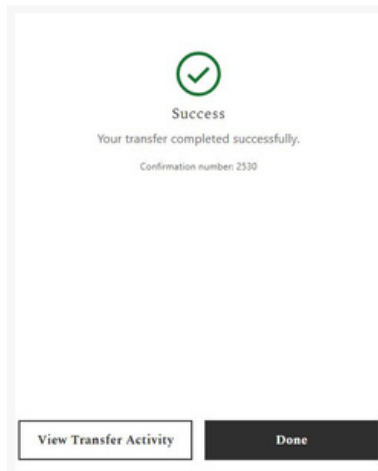


The 'Review Transfer' dialog box displays the following information:

- Amount:** \$0.01
- Accounts:**
 - From Account:** Spend Local Business
 - To Account:** Tortellini
- When:**
 - Date:** Sep 25, 2025
 - Frequency:** One Time
- Memo:**
 - Description:** Reimbursement

At the bottom, there are two buttons: 'Edit Transfer' and 'Submit Transfer'.

Click **Submit Transfer**. You will receive a success screen confirming that the internal Walden transfer has been completed.



NOTE: Internal transfers are instant. You can view your history of transfers by going to **Money Movement** → **Internal Transfers** → **Activity**.