BUSINESS LINKING ACCOUNTS

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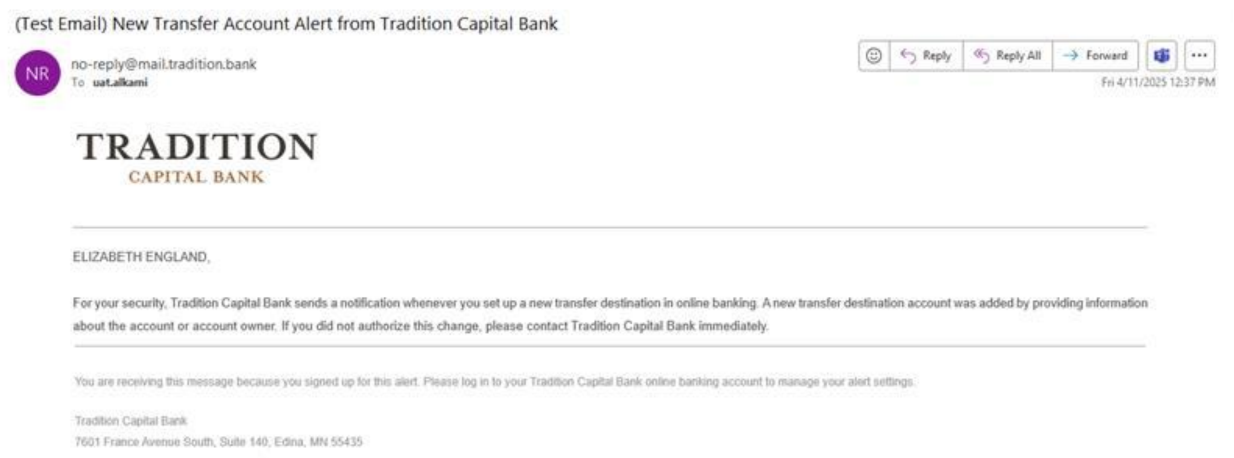
Link to another Tradition Capital Bank Client's Account (Cross Account Transfer)

Create a one-time or permanent link to another client's account to make one-time and recurring transfers to that account. You have the option to link to another client's account using their name and account number.

To add an internal account:

1. Select **Transfers** under Transfer & Pay tab.
2. Select **More Actions** and click **Add Account** tile.
3. Select **Link to another Tradition Capital Bank Client's account to send them money** from the right menu.
4. Enter the recipient's information and click save.
5. During the process to add an account, the user will be prompted to pass MFA via one of their available methods (SMS, voice, 2FA, token, etc.)

The owner of the account will also receive an email that their account has been added as a transfer destination if the account is associated with a registered Arena user. For business accounts, the email listed at the entity level will be the email that receives the notification, and no business sub users will receive this.



Linking External Accounts for Account Aggregation

Adding accounts from other FIs makes it convenient for end users to view their assets and liabilities in one place.

To add an external account:

1. Select **Transfers** under Transfer & Pay tab.
2. Select **More Actions** and click **Add Account** tile.

3. Select **Add an External Account to View its Balance** from the right menu.
4. Search for the external FI and agree to terms and conditions.
5. Sign into external FI's online banking.

After the platform displays a success message to confirm the external institution was successfully added, it will begin the process of retrieving account details such as name, balance, or type and reading transactions.

You will see your account details and transactions in the Accounts or Dashboard widgets after sixty seconds or less.