WEALTH GEN
INVESTOR

TRANSFERS AND PAYMENTS / CLIENT GUIDE 03

Transferring funds between your accounts

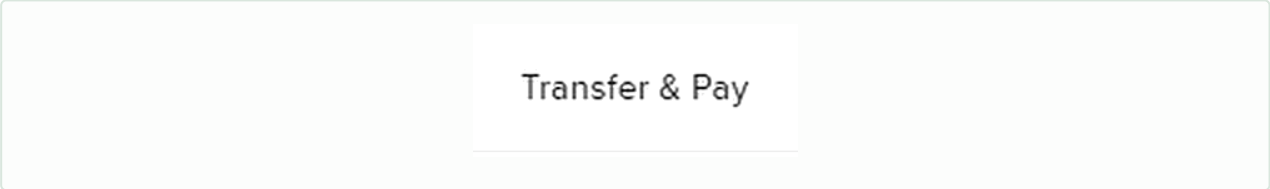
How to move cash from your main account to a linked account within the portal.

WHERE	LOG IN AS	SETTLEMENT
Client Portal	The main account	Instant

STEP BY STEP

1 Log in to the main account

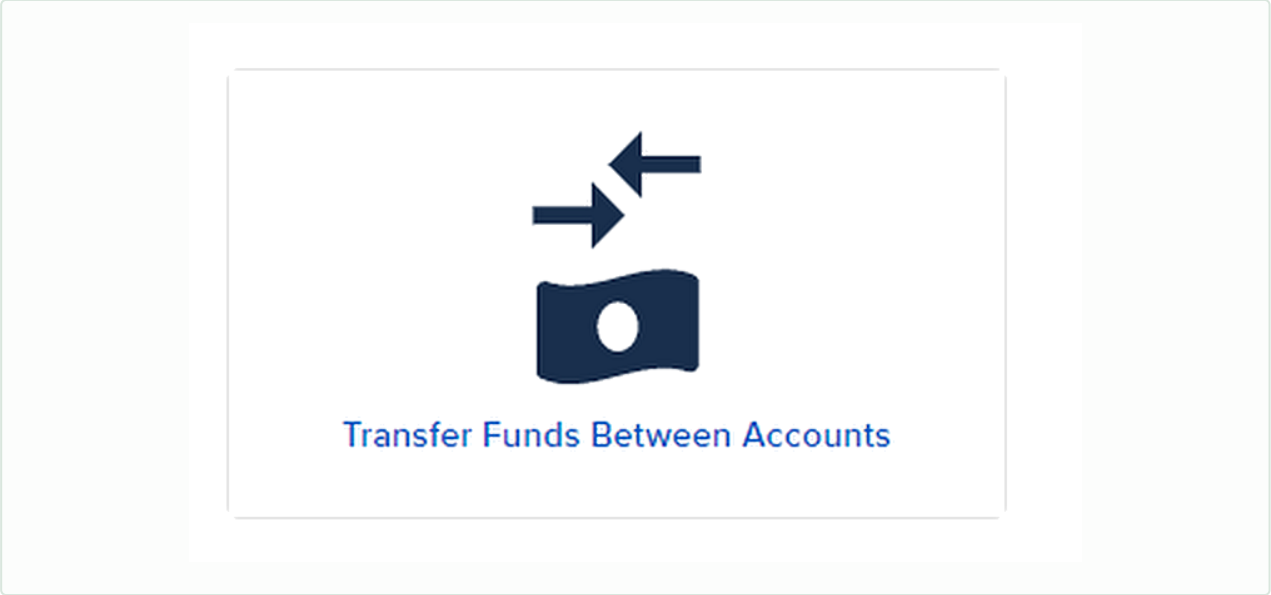
Sign in to Client Portal using the main account, then select **Transfer & Pay**.



Transfer & Pay in the top navigation

2 Select Transfer Funds

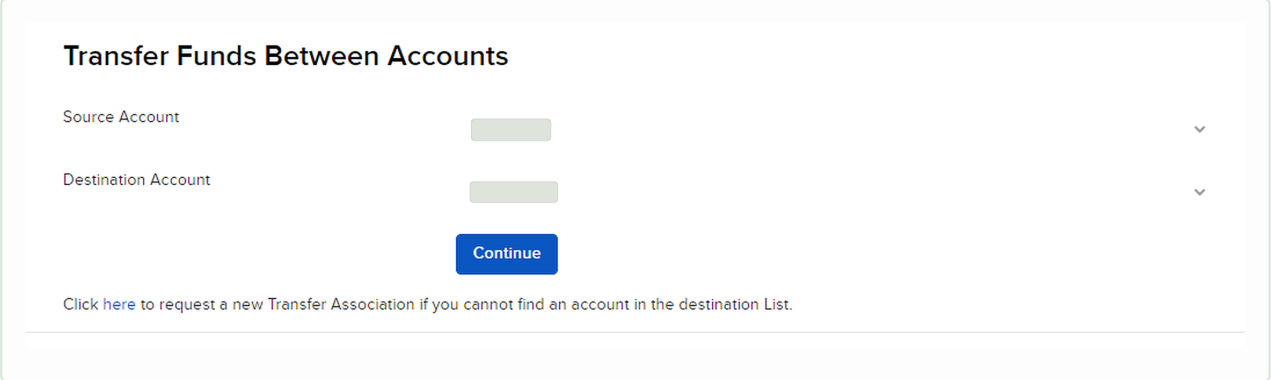
Choose **Transfer Funds**, then **Transfer Funds Between Accounts**.



Transfer Funds Between Accounts

3 Check the source account

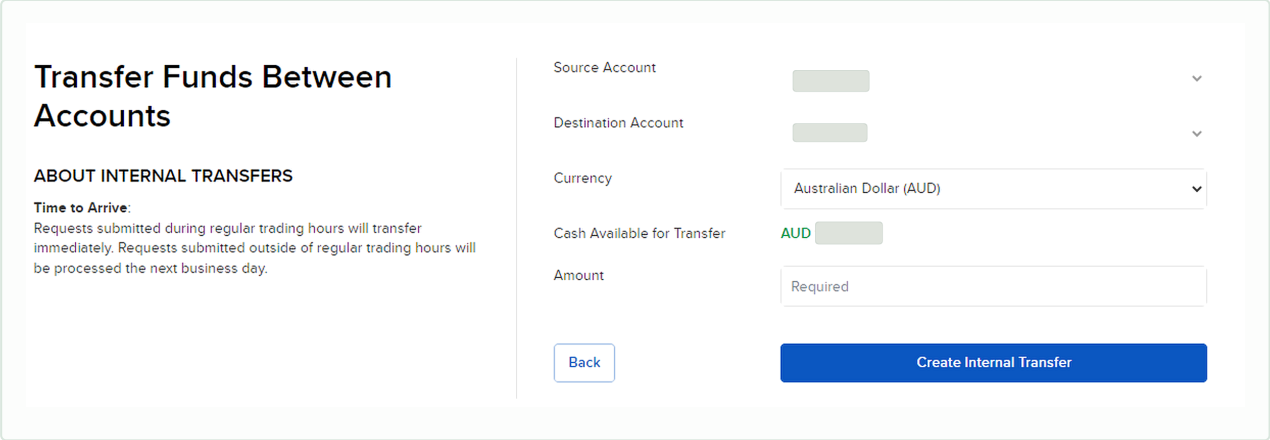
The source accounts will load. Check the main account is the first one listed, then click **Continue**.



Confirm the source and destination accounts

4 Enter the amount

The available amount will load. You can move all or part of it — enter the amount in the box provided and click **Create Internal Transfer**.



Enter the amount and create the transfer

5 Confirm the transfer

A review or confirmation screen will appear. If a review screen appears, click **Continue** or **Confirm** again. The confirmation screen will then display and the funds transfer instantly.

NEED A HAND?

If anything on this page looks different to your screen, or a step does not complete, contact our customer service desk before trying again.

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Screens, menu names and button positions shown in this guide may differ slightly from what you see, as the platform is updated from time to time. Screenshots are for illustration only.

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