TRANSFERS AND PAYMENTS / CLIENT GUIDE 06

Making a withdrawal

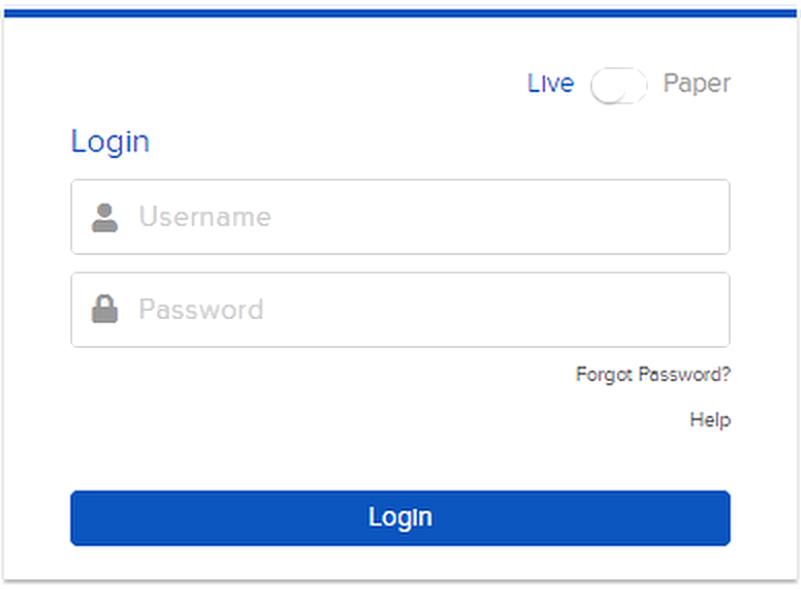
How to add your bank details and withdraw funds from your live account to an Australian bank account.

WHERE	YOU'LL NEED	AUTHORISATION
Client Portal	BSB and account number	IBKR mobile app

STEP BY STEP

1 Log in to your portal

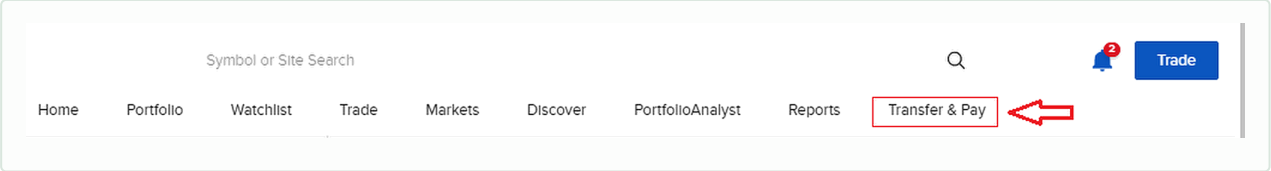
Sign in with your username and password at the login window.



The live account login window

2 Open Transfer & Pay

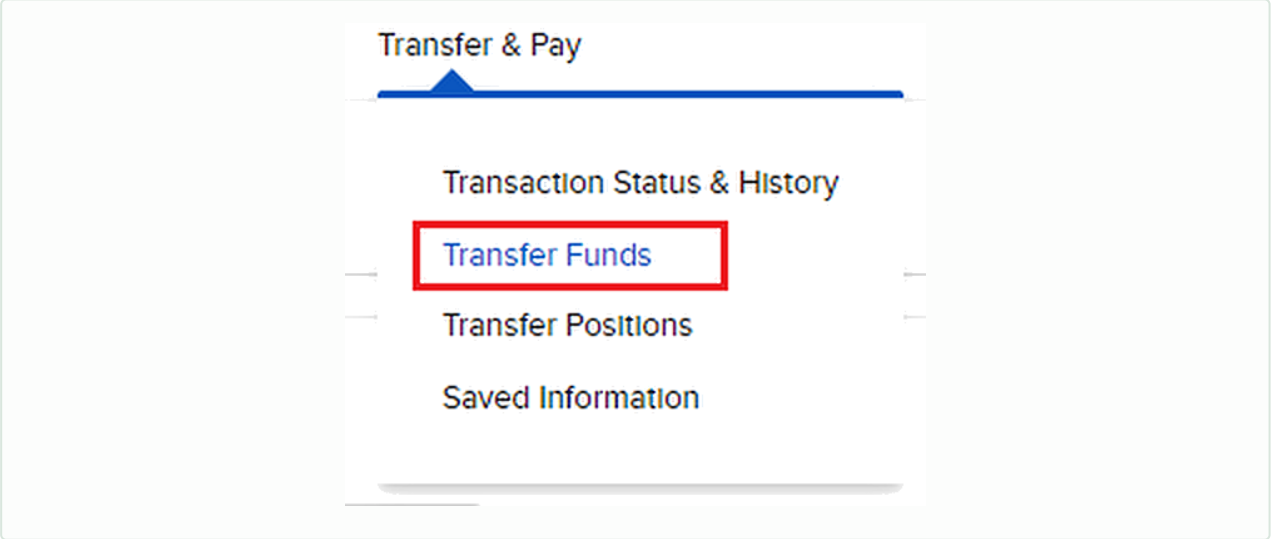
Click **Transfer & Pay** along the top of the page. The options will appear below it.



Transfer & Pay in the top navigation

3 Select Transfer Funds

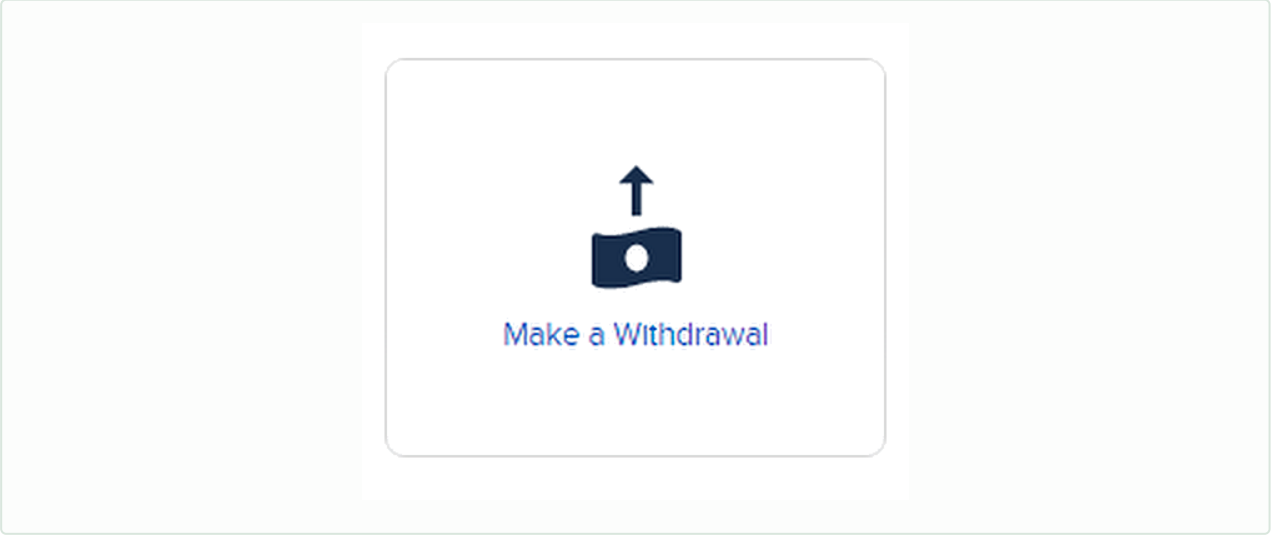
Choose **Transfer Funds** from the menu.



Transfer Funds in the Transfer & Pay menu

4 Choose Make a Withdrawal

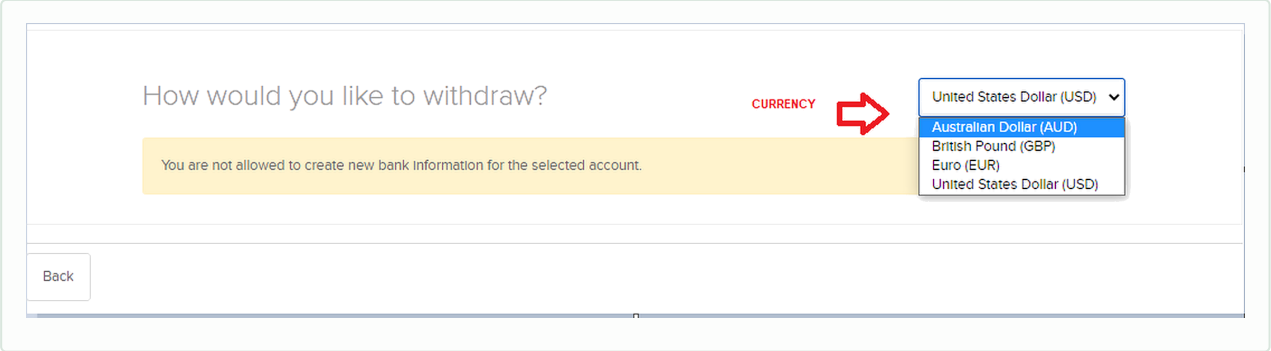
Select **Make a Withdrawal**.



Make a Withdrawal

5 Change the currency to AUD

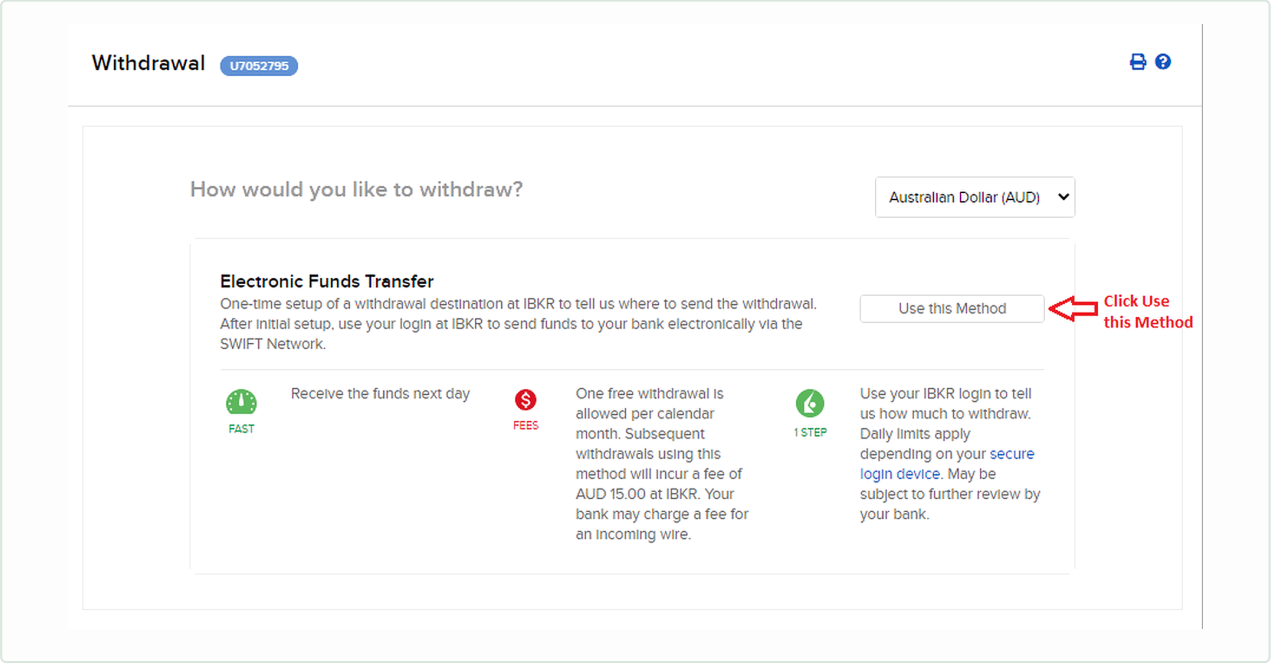
Set the withdrawal currency to **AUD**.



Select AUD as the withdrawal currency

6 Click Use This Method

Confirm the withdrawal method to continue.

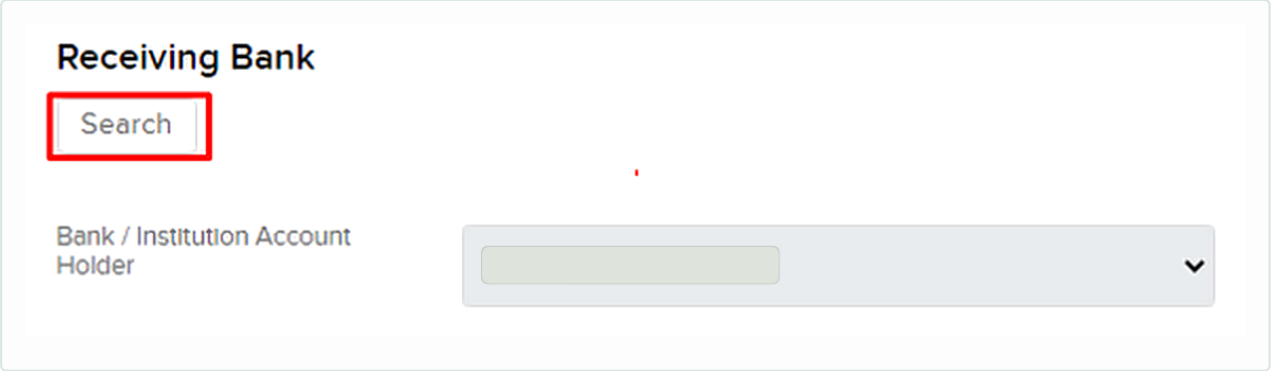


Use This Method

7 Enter your bank details

Complete the required fields:

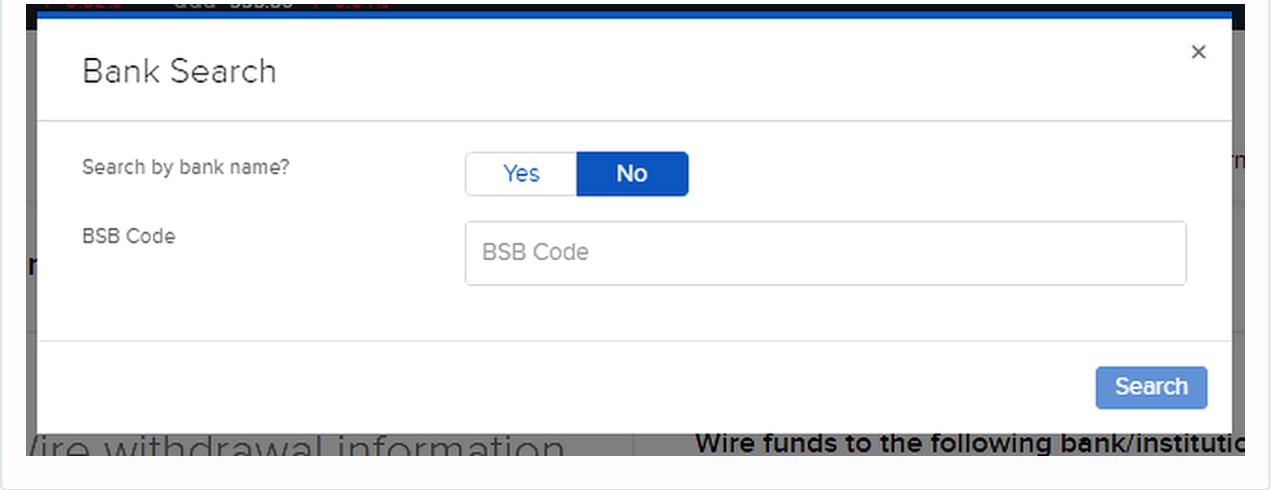
- **Where will the funds be deposited?** Choose Bank or Financial Institution.
- **Bank country:** Australia.
- **Bank account number:** your bank account number, then re-enter it to confirm.
- **Bank institution:** click the **Search** button to enter your BSB.



Use the Search button to look up your bank

8 Search for your BSB

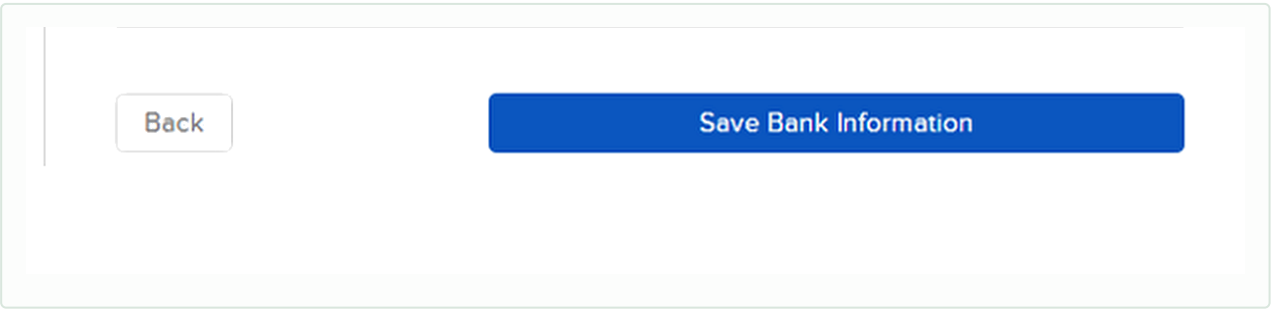
A pop-up window will appear. Enter your BSB code and click **Search**. Your bank information will load.



Enter your BSB code and search

9 Save the bank information

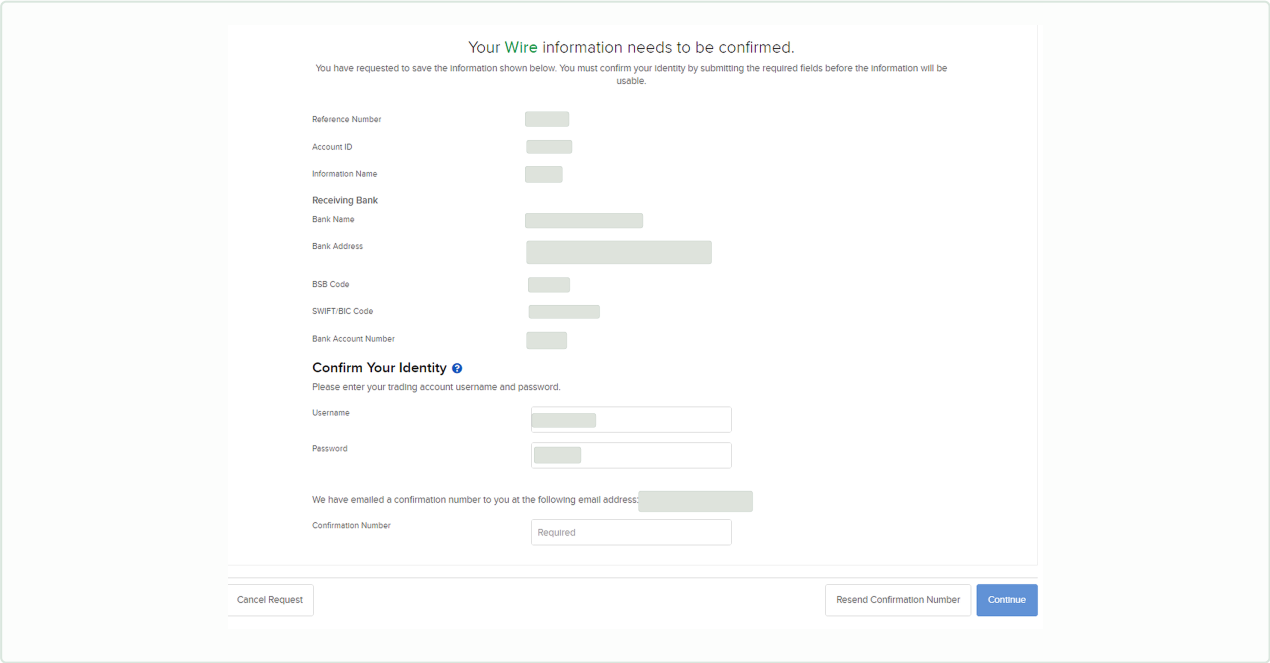
Scroll to the bottom of the screen and click **Save Bank Information**.



Save Bank Information

10 Verify the bank details

You will be asked to enter your live account username and password, and you will receive a notification from the IBKR mobile app. Authorise it, then click **Finish** to save the bank details to the portal.



Confirm the details and verify your identity

11 Start the withdrawal

Go to the menu or home page and select **Transfer & Pay**, then **Transfer Funds**. You will see the bank account nickname you saved with a **Select** button beside it. Click **Select** and the amount available in AUD will display.

12 Enter the amount

Type in the amount you want to withdraw and click **Continue**.

13 Authorise the withdrawal

Enter your trading account login details and authorise the login when the notification arrives from the IBKR mobile app. The screen will then confirm the withdrawal has been sent for processing.

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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