

Transfer Instructions

The following instructions are for the Morgan Stanley Online portal. If setting up via the mobile app, you would click **Pay + Transfer** in step 1 and then **Transfers**. The remaining steps, 2-7, would be the same.

1. On the Morgan Stanley Online Home screen, hover over **Pay, Transfers + Budget**, then click **Transfers**.
2. Click **Manage External Accounts**.
3. Click **Add an External Account** and click **Continue**.
4. Select the appropriate **Financial Institution name** and follow the prompts.

Once external bank is linked,

5. Hover over **Pay, Transfers + Budget**, then click **Transfers**.
6. On the Transfers screen, click **Transfer Funds**.
7. You will see the added account in the account options. You can setup recurring transfers here as well.

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