Personal Online Banking - External Transfers Account Setup

The External Transfers feature is a simple and convenient money management tool to transfer funds between your online account at Boston Private and an account at another financial institution.

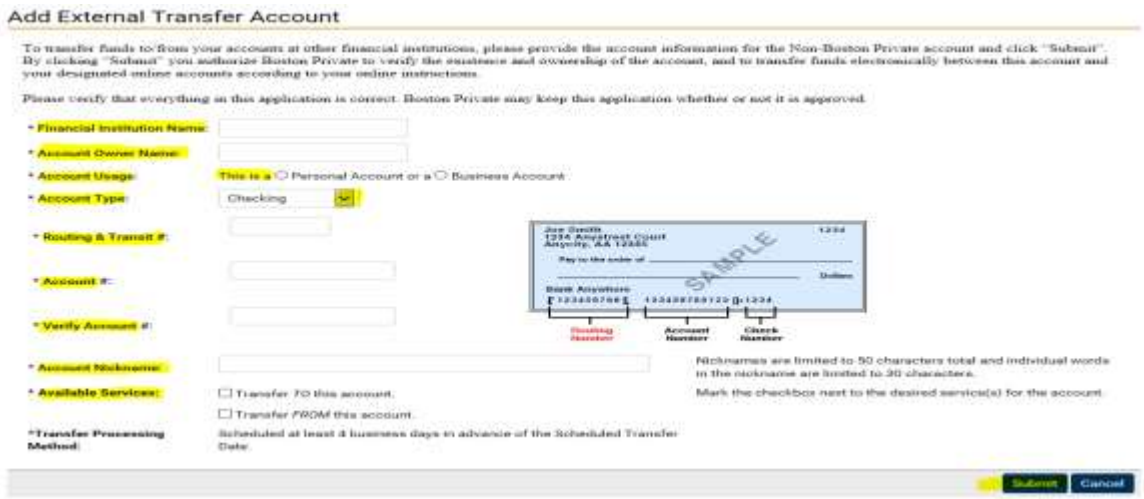
Entering an External Account Transfer Request

A. Choose the Transfers tab and select Add External Transfer Account.

B. Read the Agreement page, and then click the **Accept** button (located at the bottom left of the page) to continue. Note: **Print** option is available.

C. External Transfer Account page: Please complete all required fields (*)**.** Then click, **Submit**

Note: External Transfer Account setup is for non-Boston Private Accounts ONLY.



D. On the Confirmation page, review the information, and then click **Submit** to continue. Then click **Done** on the following screen.

E. Online Banking Message notification forwarded to Online Banking user:

Thank you for your request to add an external account to your Boston Private Online Banking profile.
To enable your account for transfers, additional security measures are required to verify your ownership of the account.

We will make two small deposits (each less than $1.00) and one offsetting debit to your external account within 2-3 business days. They will appear as “BPB Auth. Crdt.” in your account activity.

Please follow the steps below to complete your enrollment:
1. Log into your external account
2. Note the amount of the two small deposits and the one debit transaction processed by Boston Private
3. Call us at one of the numbers below to confirm the amounts of the three small transactions

Boston: (617) 912- 4000
Southern California: (888) 322-2120.

After you complete these steps, your account will be activated for external transfers.

Note: If the transaction amounts are not validated within 30 days, your account add request will be declined.