

SELECT A CHECKING/BROKERAGE ACCOUNT TO USE WITH MAX



CHECKING

Use **MAX** to boost the yield on a set amount of cash or use **MAX** to help keep your existing checking account optimized.

OPEN HIGH-YIELD SAVINGS ACCOUNTS

ONLINE SAVINGS



CHECKING

Open online savings accounts. The **MAX** Common Application makes it easy.

START YOUR FIRST OPTIMIZATION

ONLINE SAVINGS



CHECKING

Fund your account and then start your first optimization.

- 1** **(A)** You can fund **MAX** with a **specific amount** of cash regardless of where you bank or invest using the free, no-minimum **Max Checking** account, or
- (B)** You can use **MAX** to maintain a target balance in your existing checking/brokerage cash account and sweep excess funds to higher-yield savings accounts each month*

Supported checking accounts:

- Bank of America
- JP Morgan / Chase
- BB&T
- Charles Schwab Bank
- E*Trade Bank
- Fifth Third Bank
- Huntington Bank
- TD Bank
- USAA Bank
- Citibank
- Wells Fargo
- BBVA Compass
- City National Bank
- Fidelity CMA
- First Republic Bank
- SunTrust
- US Bank
- Zions Bank

2 Set your target checking account balance

As **MAX** optimizes your accounts each month, it will restore the balance in your linked checking account to your desired balance.

3 Use the MAX Common Application to open high-yield online savings accounts instantly

- ✓ Opens in as little as 60 seconds
- ✓ Max automatically links to these accounts - no need for separate logins or trial deposits
- ✓ Preferred terms (no minimums, no monthly fees, higher daily transfer limits)
- ✓ Preferential rates exclusive to MAX
- ✓ Up to \$250,000 of FDIC insurance coverage per depositor per bank

Want to use Max with an Ally, American Express, Barclays or Marcus account?

Either link your existing online savings account to **MAX** or open a new account and then link it to **MAX**.

Visit MaxMyInterest.com/Link to see how to link your checking account as an external account on each online bank's website.

4 Initiate your first optimization

(A) If you selected a Max Checking account, you'll need to fund your account. Max Checking is easy to fund click "Add Funds" to link funding accounts or add Max Checking as an external account to a checking/brokerage account to move funds back and forth. Your routing and account number can be found on the "Checking" tab of your Max account. You can also fund your account by wire transfer. Once you have sufficient funds to start your optimization, click "Start First Optimization."

(B) If you linked your existing checking account, simply click "Start First Optimization" and your funds will move to your high-yielding savings accounts automatically.

5 Setup is complete

MAX will keep your funds optimized each month, so that you can earn more, even as rates change.

Need help at any point?
Email: member.services@maxmyinterest.com