How to Set Up Your Max Account

**SELECT A CHECKING ACCOUNT TO USE WITH MAX**

Use MAX to earn more on your cash regardless of where you bank.

(A) Most Popular: Fund MAX with any amount of cash regardless of where you bank or invest using our integrated, free Max Checking account to handle the transfers between your online savings accounts as rates change*

or

(B) Use MAX with your existing checking account to maintain a target checking balance 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

During setup, you’ll be asked to set your target checking account balance

Each month, MAX will help you restore the balance in this checking account to your desired balance.

**OPEN HIGH-YIELD SAVINGS ACCOUNTS**

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

**START YOUR FIRST OPTIMIZATION**

Initiate your first optimization

(A) If you selected Max Checking, you can easily fund your account. Click “Add Funds” to instantly link funding accounts.

- You can also fund your account by wire or by transferring funds in from your existing bank accounts.
- Your Max Checking routing and account number can be found on the “Checking” tab of your Max account.

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” to tell your banks to move excess cash from your checking account to your higher-yielding savings accounts.

Setup is complete

MAX will help you 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


Max Checking is powered by LendingClub Bank, N.A., FDIC #32551

* As rates change, your banks will transfer funds into and out of your checking account to help you optimize your accounts each month.