



## SWITCH KIT CHECKLIST

Print out the following checklist and mark off items you complete.

- Make sure all checks have cleared on your old checking account.
- Make certain enough funds are available in your old account to cover any automatic payments that may yet need to be withdrawn.
- Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties.
- Send written notice to your direct deposit vendors (payroll, social security, CD interest payments, etc.) that you want your direct deposits to go to your new Credit Union 1 account.
- Send written notice to your vendors who automatically take your payments from your checking account (utilities, insurance companies, internet service providers, etc.) providing them with your new Credit Union 1 account information. Check for possible online availability to make this change.
- Send notification of new account information to vendors who you want to start a new automatic payment with. Check for possible online availability to make this change.
- Send written notice to your old financial institution, or visit local branch office, notifying them that you are closing your account.