

Switch Kit Checklist

Check the boxes next to the items you've completed (if any), and then print out this checklist and keep it available for future reference. As you begin to complete items, simply check off the boxes on your printed copy.



<input type="checkbox"/>	Make sure all checks have cleared on your old checking account.
<input type="checkbox"/>	Make certain enough funds are available in your old account to cover any automatic payments that may still need to be withdrawn.
<input type="checkbox"/>	*Send written notice to the companies you have direct deposit set up with (payroll, social security, etc.) notifying them that you want your direct deposits to now go to Five County CU. Also, send written notice to set up direct deposit with any new companies or individuals.
<input type="checkbox"/>	*Send written notice to companies who automatically take your payments from your checking account (utilities, insurance, credit cards, internet service providers, banks, etc.) notifying them that you are closing the account.
<input type="checkbox"/>	*Send notification of your new account information to companies who you want to continue to generate automatic withdrawals.
<input type="checkbox"/>	*Send notification to start a new automatic payment with a vendor.
<input type="checkbox"/>	*Send written notice to your old financial institution informing them that you are closing your account.
<input type="checkbox"/>	Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties.
<input type="checkbox"/>	Sign up for Five County Credit Union's convenient Online Banking and free Bill Payment services.
<input type="checkbox"/>	* A form is available in Five County Credit Union's Switch Kit for this purpose.