



## **Membership Account Switch Checklist**

### **1. Open Your New Credit Union Account**

Choose the right account type (checking, savings, etc.)

Set up online/mobile banking access

Order debit card and checks (if needed)

### **2. Stop Using Your Old Account**

Stop writing checks from the old account

Stop using old debit card

Leave enough funds to cover pending transactions

### **3. Transfer Direct Deposits**

Notify your employer/payroll provider

Update Social Security or pension deposits

Update any other recurring deposits (e.g., investment income)

### **4. Transfer Automatic Payments**

List all recurring payments (utilities, subscriptions, loans, etc.)

Update payment info with each provider

Set up bill pay in your new account (if applicable)

### **5. Move Any Linked Accounts**

Update connections to apps like Venmo, PayPal, Zelle, etc.

Update any linked savings or investment accounts

### **6. Close Your Old Account**

Confirm all checks and payments have cleared

Transfer remaining balance to your new account

Request account closure in writing

Destroy old checks and debit cards