

New Account Conversion Checklist



1. **Have your new 1st Community Credit Union account number ready when completing authorization forms in switch kit:**

Account number _____ checking / savings

Account number _____ checking / savings

Account number _____ checking / savings

2. **Switch direct deposits and automatic deposits using the Direct Deposit Change Authorization Form**

Employer deposit
 Government deposit
 Court-ordered deposits
 Other

Brokerage deposit
 Child Support
 Social Security deposit

3. **Switch automatic payments/withdrawals using the Automatic Withdrawal Change Authorization Form**

Mortgage/Rent
 Association Fees
 Internet Service
 Investments
 Utilities: Electric, Water, Gas
 Online Billing

Auto
 Club/Membership Dues
 Cable TV/Satellite
 Credit Cards
 Phone/Cell Phone
 Other

4. **Close all other savings, checking, and bill payment accounts using the Account Closing Authorization Form**

Financial Institution(s) _____

5. **Transfer high-rate credit card balances to 1st CCU Credit Card**
6. **Refinance loans held at previous financial institution(s)**
7. **Set up additional services with 1st Community Credit Union**

Free Bill-Pay
 Free E-statements
 Free CU Online internet banking
 Free PATT telephone banking
 Free Automatic Transfers between accounts