

UNITY ONE CREDIT UNION SWITCH KIT CHECKLIST

Use this checklist to help you track the account switching process.



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Unity One Credit Union Checking Account Information:

Account Number: _____ Routing & Transit Number (ABA): 296076369

1 Managing Your Old Account

- Verify that all checks, check card transactions and scheduled bill payments have cleared your old checking account.
- Make certain funds are available in your old account to cover any automatic payments, checks and check card transactions that may still be withdrawn. Check maturity dates on Certificate of Deposits, if transferring, in order to avoid early withdrawal penalties.

2 Direct Deposit

- Send written notices to companies with which you have direct deposit (employer, government, pension, other financials, etc.) notifying them that you want to switch your direct deposits to your new Unity One CU account.
- Send written notice to any new companies to add direct deposit.
Use our online "Direct Deposit Change Form" in our online Switch Kit.

3 Automatic Payments (ACH)

- Send written notices to companies that automatically take payments from your checking account (utilities, mortgage, insurance, credit cards, etc.) notifying them that you are closing your account and that they should change your payment information to your new Unity One CU account.
Use our online "Change Automatic Payments Form" in our online Switch Kit.

4 Debit Card

- Contact companies that take payments from your old checking account using your debit card. Inform them of your new Unity One CU debit card number and expiration date.

5 Final Step

- Verify that your direct deposits and automatic payments have started posting to your new Unity One CU account.
- Send written notice to your old financial institution informing them that you are closing your account. Be sure that all pending items have cleared your old account.
Use our online "Accounts Closing Request Form" in our online Switch Kit.
- Try using Unity One CU's FREE online bill pay to pay your bills. If you're currently using a bill pay system, you can easily switch those bill payments to Unity One.

Congratulations on switching your account to Unity One Credit Union!

Unity One Credit Union is a full-service financial institution; check out all we have to offer: great rates on loans, Visa credit cards, free ATMs at nearly 30,000 locations nationwide, free mobile banking app with Mobile Deposit and more!