



# Make the **SWITCH!**

## ***Transitioning Your Checking Account to Co-op Credit Union is Easy!***

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*Use this step-by-step guide to check off all the necessary steps.*

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### **Step 1: Open a checking account at CCU.**

Give us a call at 800-258-0023 or stop in to any of our branch locations to start the process of opening your new account! We'll take care of ensuring you receive your new debit card and/or checks.

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### **Step 2: Address your direct deposits.**

Move your direct deposit/s from your old account to your new CCU checking account. This will require:

- Your CCU 10-digit checking account number
- CCU's routing number: 275977120
- Direct Deposit Transfer Request Form
- The address and phone number of the employer or institution where you currently have your direct deposit.

Once compiled and completed, fill out your Direct Deposit Transfer Request form and send it to the appropriate institutions that direct deposit into your account. (These can include your employer, retirement plans and government deposits, among others.)

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### **Step 3: Change your automatic payments.**

Discontinue the automatic payments being made from your current checking account. These can include, but are not limited to, loan payments, utilities, insurance, cable and internet providers, memberships and more.

These may be set up differently based on each vendor's automatic payment methods, or whether or not you utilized Bill Pay services or your debit card for your previous checking account. Make a list of all your payments and review how you've been paying them to ensure you discontinue all of them and set them up for payment from your new CCU checking account.

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### **Step 4: Close your old account.**

Once you've completed all the steps, review to make sure all activity is complete in your old account. (Verify all checks and debit card transactions clear your account and discontinue all forms of bill and auto payment.)

When you're confident you've verified everything, contact your old financial institution and close that checking account.

***Now you're ready to begin regularly using your CCU checking account!***