Switch Kit Checklist

Print this checklist and check off the boxes on your printed copy as you complete items.

- [ ] Open your membership and checking account at Northern Communities Credit Union. You may do this by visiting any of our branch locations or by going to our **EasyZ Loan & membership application**.

- [ ] 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available in your old account to cover any automatic payments, checks, and check card transactions that may still be withdrawn.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 Certificates of Deposit if transferring in order to avoid early withdrawal penalties.

- [ ] **Direct Deposit Change Request Form**
  Send written notices to companies with which you have direct deposit (employer, government deposits, pension, transfers from other financial institutions, investment dividends, child support or court-issued deposits, etc.) notifying them that you want to switch your direct deposits to your new Northern Communities Credit Union account.

- [ ] **Authorization Agreement for Direct Deposit Form**
  Send written notice to set up direct deposits with any new companies or individuals.
  To change Social Security deposits, visit: www.ssa.gov/deposit/howtosign.htm or call the Social Security Administration at 1-800-772-1213 (TTY 1-800-325-0778)
  Northern Communities Credit Union Routing/Transit number: 291973629

- [ ] **Authorization for Canceling Automatic Payment Forms**
  Send written notices to companies that automatically take payments from your checking (utilities, mortgage, insurance, brokerage, credit cards, internet service providers, transfers to banks, child support or court-issued payments) notifying them that you are closing the account.

- [ ] **Authorization for Automatic Payment Transfer Form**
  Add a notification with your new account if you wish to continue automatic payments at Northern Communities Credit Union.

- [ ] **Authorization for Automatic Payment Form**
  Send a notification if you wish to add new automatic payments.

- [ ] Contact companies that take payments from your old checking account using a debit card. Inform them of your new Northern Communities Credit Union Check Card number and expiration date. If you prefer, you may set up this payment as an automatic payment rather than debit card payment using the **Authorization for Automatic Payment Form.**

- [ ] Verify that your direct deposits and automatic payments have begun posting to your new account.

- [ ] **Account Closing Request Form**
  Send written notice to your old financial institution informing them you are closing your account.

Thank you for your business with NCCYou!