



NEW ACCOUNT SWITCH LIST

The Quick & Easy Way to Make Total Choice FCU Your 1st Choice for Financial Success

Print this checklist and mark each item off as you complete your conversion to Total Choice FCU.

- Be sure all of your checks have cleared your old checking account.
- Make certain enough funds are available in your old account to cover any ACH/automatic payments that may still need to be withdrawn.
- Double check maturity dates if transferring a Certificate of Deposit in order to avoid any possible penalties.
- Send written notice to your direct deposit vendors, such as: your payroll department, social security, or interest payment providers, etc., informing them of your change to Total Choice FCU. (See attached Direct Deposit Form.)
- Send written notice to all vendors who automatically take your payments from your checking account, such as: utility companies, insurance companies, internet, cable, cellular providers, etc. that you are closing the old account and opening a new account with Total Choice FCU. (See attached Automatic Payment Transfer Form.)
- Finally, send a written notice to your old financial institution that you are closing the account. (See attached Account Closing Request Form.)