



## Switch Kit Checklist

### CHANGE IS GOOD.

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

<p>Open your membership and checking account at SoundView Financial Credit Union. You may do this by visiting any of our branch locations or by completing an online <i>Account Card</i>.</p>
<p>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available in your old account to cover any automatic payments, checks, and check card transactions that may still be withdrawn.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.</p>
<p><i>Direct Deposit Change Request Form</i> 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 SoundView Financial Credit Union account.</p>
<p><i>Direct Deposit / Payroll Deduction Authorization Form</i> Send written notice to set up direct deposits with any new companies or individuals. To change Social Security deposits, visit: <a href="http://www.ssa.gov/deposit/howtosign.htm">www.ssa.gov/deposit/howtosign.htm</a> Or call the Social Security Administration: 1-800-772-1213 (TTY 1-800-325-0778) <b>SoundView Financial Credit Union Routing/Transit number: 221183159</b></p>
<p><i>Request to Cancel Automatic Payments Form</i> Send written notices to companies that automatically take payments from your checking account (utilities, mortgage, insurance, brokerage, credit cards, internet service providers, transfers to banks, child support, court issued payments, etc) notifying them that you are closing the account.</p>
<p><i>Request to Change Automatic Payments Form</i> Send this form to companies notifying them that you want to transfer existing automatic payments from your previous financial institution to SoundView Financial Credit Union.</p>
<p>Contact companies that take payments from your old checking account using a debit card. Inform them of your new SoundView Financial Credit Union Debit Card number and expiration date. (If you prefer, you may set up this payment up as an automatic payment rather than debit card payment using the Authorization for Automatic Payment Form.</p>
<p>Verify your direct deposits and automatic payments have begun posting to your new account.</p>
<p>Verify that all checks, check card transactions, and scheduled bill payments have cleared your old checking account.</p>
<p><i>Account Closing Request Form</i> Send written notice to your old financial institution informing them you are closing your account.</p>