

Switch Kit

Wauna Federal Credit Union

Switch your accounts to
Wauna in three easy steps.



Checklist — Changing Your Banking Account

Check the boxes next to the items you've completed (if any), and then print out this checklist and keep it available for future reference. As you begin to complete items, simply check off the boxes on your printed copy.

- Make sure all checks have cleared on your old checking account.
- Make certain enough funds are available in your old account to cover any automatic payments that may still need to be withdrawn.
- *Send **written notice** to the companies you have direct deposit set up with (payroll, social security,, etc.) notifying them that you want your direct deposits to now go to Wauna FCU. Also, send **written notice** to set up direct deposit with any new companies or individuals.
- *Send **written notice** to companies who automatically take your payments from your checking account (utilities, insurance, credit cards, internet service providers, banks, etc.) notifying them that you are closing the account.
- *Send **notification** of your new account information to companies who you want to continue to generate automatic withdrawals.
- *Send **notification** to start a new automatic payment with a vendor.
- *Send **written notice** to your old financial institution informing them that you are closing your account.
- Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties.
- Sign up for Wauna's convenient **Home Banking** and free **Bill Payment** services.

* A form is available in Wauna's Switch Kit for this purpose.