

EZ Switch Kit Checklist

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



- q Open your membership and checking account at NorState Federal Credit Union. You may do this by visiting any of our branch locations.
- q 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available in your old account to cover any automatic payments, checks, and check card transactions that may still be withdrawn.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.
- q Verify that all checks, check card transactions, and scheduled bill payments have cleared your old checking account before closing.
- q Print, complete and bring to any NorState FCU office:
 - q Direct Deposit Change Request Form
 - § *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 NorState Federal Credit Union account.*
 - q Authorization Agreement for Direct Deposit Form
 - § *Notices 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: 1-800-772-1213 (TTY 1-800-325-0778)*
NorState Federal Credit Union Routing/Transit number: 2112-8801-9
 - q Authorization for Canceling Automatic Payments Form
 - § *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 switching the account.*
 - q Authorization for Automatic Payment Transfer Form
 - § *Notification with your new account if you wish to continue automatic payments at NorState Federal Credit Union.*
 - q Authorization for Automatic Payment Form
 - § *Notification if you wish to add new automatic payments.*
- q Contact companies that take payments from your old checking account using a debit card. Inform them of your new NorState Federal Credit Union Check 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.
- q Verify your direct deposits and automatic payments have begun posting to your new account, before closing your previous accounts.
- q Account Closing Request Form
Notify your old financial institution informing them you are closing your account.