SWITCH KIT CHECKLIST

☑ Use our convenient checklist to help you make the switch to Ironworkers USA Credit Union today.

- ☐ 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- ☐ Make certain enough funds are available in your old account to cover any automatic payments that may yet need to be withdrawn.
- ☐ Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties.
- ☐ Send written notice to your direct deposit vendors, such as: payroll, social security, CD interest payments, etc., of the change in your relationship.
  - ☐ Download and complete Direct Deposit Change Request Form: https://ironworkersfcu.org/wp-content/uploads/2019/01/Ironworkers_DirectDepositForm.pdf
- ☐ Send written notice to your vendors who automatically take your payments from your checking account, such as utility companies, insurance companies, internet service providers, banks, etc., that you are closing the account.
- ☐ Send written notice to your old financial institution that you are closing the account.
  - ☐ Download and complete Account Closing Request Form: https://ironworkersfcu.org/wp-content/uploads/2019/03/Account-Closure-Form.pdf