

New Account Switch Kit Checklist

Keep this checklist handy to check off items as they are completed.

In five easy steps you will have switched your checking account to Habersham Federal Credit Union.

- Make sure all checks/debits have cleared your existing checking account
- Make sure there are enough funds available in your old account for items that may need to be paid.
- Send the Direct Deposit Change Request* to your direct deposit vendors (payroll, social security, etc.) to notify them of your change in banking relationship.

*For Habersham County BOE direct deposits please complete the Authorization for Automated Deposits and return to the business office.

- Send the Payment Transfer Request to your vendors who automatically take payments from your checking account (utilities, insurance companies, Internet service providers, etc.). Be sure to contact companies to see if you will need to include a voided check with your request.
- Send the Request to Close Account form to your old bank to close account. Your old bank will send you a check for the remaining balance in the account. Be sure all checks have cleared and all automatic payments have been transferred before sending this form.