

▶ **SWITCH KIT**

Three easy steps to complete your switch to Credit Union of America.

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Welcome to Friendly

We're so glad you chose Credit Union of America for your financial journey!

We want your transition to be easy, so we've put together a simple checklist to ensure your switch to Credit Union of America is seamless and effortless.

Step 1: Transfer Your Direct Deposit

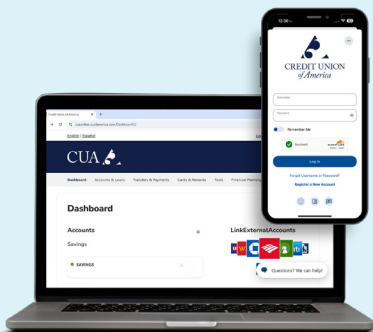
- ☐ Identify direct deposits you need to switch to your new account.
- ☐ Transfer these deposits to your new CUA checking account using the enclosed Direct Deposit Authorization Form.

Step 2: Change Your Payments

- ☐ List all automatic payments and subscriptions currently linked to your former account.
- ☐ Update your automatic payments by logging in to each payee's website or app to update your account information, or set them up in CUA Digital Banking using BillPay or recurring transfers.
- ☐ Cancel any existing bill pay services at your former financial institution.

Step 3: Close Your Former Account

- ☐ Confirm that all automatic deposits have been transferred.
- ☐ Confirm all automatic payments have been transferred.
- ☐ Confirm that all outstanding checks have cleared.
- ☐ Confirm that all debit card transactions have cleared.
- ☐ Transfer any remaining deposits to your new CUA checking account.
- ☐ Contact your former bank to request the account closure, or complete the enclosed Account Closing Request form and send it to your former financial institution.
- ☐ Destroy any unused checks, debit/ATM cards, and deposit slips associated with your former account.



Switching is Easier With Digital Banking from CUA

Make your switch even more simple with Digital Banking, available online or through our mobile app.

Once you enroll, you'll have free access to flexible account management tools that can help you take control of your finances from anywhere, any time of the day.

To get started, visit CUofAmerica.com/Digital-Banking.

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STEP 1 TRANSFER YOUR DIRECT DEPOSIT

Identify direct deposits you need to switch to your new account using the Automatic Deposit Checklist below.

Then, transfer these deposits to your new CUA checking account by filling out the Direct Deposit Authorization Form included on the next page and submitting it to your employer's HR Department. If you have multiple employers, make copies of the form as needed.

AUTOMATIC DEPOSIT CHECKLIST:

DEPOSIT TYPE	COMPANY	ACCOUNT #	DATE OF DEPOSIT	TRANSFERRED?
Payroll				☐
Pension				☐
Insurance				☐
Social Security				☐
Taxes				☐
				☐
				☐
				☐
				☐
				☐

To transfer a social security direct deposit, you can either call the Social Security Administration or go to www.ssa.gov.

Did you know that you can get paid up to two days earlier when you set up direct deposit?¹ It's just another added member benefit to make your banking experience more friendly.

¹ EarlyPay direct deposits ACH funds into your deposit accounts up to two days early depending on the timing of the submission of the payment from the payer. Funds availability may be affected by holidays and weekends.

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DIRECT DEPOSIT AUTHORIZATION FORM:

Date: _____

TO:

Company Name: _____

Address: _____

City: _____

State: _____

Zip: _____

FROM:

Your Name: _____

Address: _____

City: _____

State: _____

Zip: _____

Please accept this notice as authorization to immediately change all recurring direct deposits to my new account with Credit Union of America, listed below. Direct deposits to my former bank account should be discontinued.

Credit Union of America

Financial Institution: _____

301180056

Routing Number: _____

New Account Number: _____

☐ Savings ☐ Checking

Signature: _____

Date: _____

If you have any questions about this request, please contact me using the information below.

Phone Number: _____

Email Address: _____

Please be sure to attach a voided check from your CUA account if required by your employer.

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STEP 2 CHANGE YOUR PAYMENTS

To manage your automatic payments, identify all recurring charges (bill payments, subscriptions, and automatic withdrawals) using your old bank statements.

Then, transfer these payments by logging in to each payee's website or app to update your account information, or by setting them up in CUA Digital Banking using BillPay or recurring transfers. Be sure to cancel any existing BillPay services at your former financial institution.

BILL PAYMENT CHECKLIST:

	COMPANY	ACCOUNT #	PAYMENT DUE DATE	TRANSFERRED?
Mortgage/Rent				☐
Auto Loan(s)				☐
Insurance				☐
Gas/Oil				☐
Electricity				☐
Water				☐
Trash				☐
Internet				☐
Credit Card				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

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STEP 2 (continued)

CHANGE YOUR PAYMENTS

RECURRING SUBSCRIPTIONS CHECKLIST:

	COMPANY	ACCOUNT #	PAYMENT DUE DATE	TRANSFERRED?
Music (i.e. Spotify)				☐
Streaming (i.e. Hulu)				☐
Grocery (i.e. Walmart+)				☐
				☐
				☐
				☐
				☐
				☐
				☐

OTHER AUTOMATIC PAYMENTS CHECKLIST:

	COMPANY	ACCOUNT #	PAYMENT DUE DATE	TRANSFERRED?
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

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STEP 3 CLOSE YOUR FORMER ACCOUNT

Almost done! After you've confirmed that all transactions have been moved and cleared, contact your former bank to close the account, or send the Account Closing Request form included below to your previous financial institution.

Once the account is officially closed, destroy all materials associated with the former account, such as debit cards, unused checks, and deposit slips.

ACCOUNT CLOSURE AUTHORIZATION FORM:

_____	_____		
Date	Former Financial Institution's Name		
_____		_____	_____
Address		City	State Zip

Please close the following account(s):

_____	_____	_____	☐ Checking	☐ Savings
Routing Number	Account Number	Effective Date		
_____	_____	_____	☐ Checking	☐ Savings
Routing Number	Account Number	Effective Date		

Any remaining funds should be sent in the form of a check to the address listed below. If you have any questions about this request, please contact me at the phone number provided.

_____	_____	_____	
Primary Account Holder's Name	Phone Number	Email	
_____	_____	_____	_____
Address	City	State	Zip

Thank you for your cooperation.

_____	_____
Primary Account Holder Signature	Date
_____	_____
Secondary Account Holder Signature (if applicable)	Date

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Switch Complete! Here's What's Next.

You've finished the key steps to switch your banking to Credit Union of America. We're so glad to have you as part of the CUA family! Here are a few more ways to make the most of your new account.

Make the Most of Your Membership

☐ **Go Paperless with eStatements**

Save \$5 monthly, get your statements 3-5 days sooner. You'll have secure, instant access to your account history whenever you need it through Digital Banking or the CUA mobile app.

☐ **Set Up Overdraft Transfer**

Protect yourself from overdrafts with automatic transfers from your Share Account for a \$5 transfer fee or from your CUA Visa® credit card for a \$5 cash advance fee.

☐ **Pay Faster with Mobile Wallet**

CUA debit cards work seamlessly with Apple Pay®, Google Pay™, and Samsung Pay®. Add your CUA debit card today for secure, contactless payments right from your phone or smartwatch.

☐ **Need Checks? We've Got You Covered**

If you prefer paying by check, you can order them personalized directly from CUA.

☐ **Activate Change Jar to Save Effortlessly**

Change Jar automatically rounds up your debit card transactions to the nearest dollar and deposits the difference into your selected savings account.

☐ **Watch Your Inbox to Stay Connected**

Over the next few weeks, we'll send you emails that walk you through helpful account tools, member benefits, and services designed to make managing your money easier — and your membership even more rewarding.

We're Here for You

Our **Member Support Center** is your go-to resource for questions and can be reached during business hours.



Call
800.256.8049



Text
316.265.3272



Chat
CUofAmerica.com/Contact-Us

Your **Financial Service Representative** is also here to support you as you complete your account setup:

Name

Email

Phone