

# EZ SWITCH KIT CHECKLIST



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

Four Simple Steps to Switch:

- 1. **Open a membership account**; all you need is \$5.00 to start and maintain a savings account. You may do this by visiting us at 93-95 Main Street, Hackensack (at the corner of Main and Atlantic, across from CVS)
- 2. **Download and complete** all the necessary forms below and print the checklist to mark your progress.
- 3. **Verify** that all checks, card transactions, and scheduled bill payments have cleared your old checking account.
- 4. **Close your account(s)** at your old financial institution.

**Print, complete and bring to 1<sup>st</sup> Bergen's Branch at 93-95 Main Street, Hackensack, NJ – we will mail or fax them for you for free!**

**Please call us at (201) 968-0202 if you have any questions.**

**1st Bergen Direct Deposit Change Request**

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 1st Bergen Federal Credit Union account.

**Authorization Agreement for Direct Deposit**

Notices to set up direct deposits with any new companies or individuals.

**To change Social Security deposits, visit:**

<http://www.socialsecurity.gov/deposit/howtosign.htm>

**Or call the Social Security Administration at:**

1-800-772-1213 (TTY 1-800-325-0778)

**1st Bergen Federal Credit Union**

**Routing/Transit number:**

**021283916**

**Authorization for Canceling Automatic Payments**

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.

**Authorization for Transferring Automatic Payments**

Notification with your new account if you wish to continue automatic payments at 1st Bergen Federal Credit Union.

**Authorization for Automatic Payment**

Notification if you wish to add new automatic payments.

- Contact companies that take payments from your old checking account using a debit card. Inform them of your new 1st Bergen Federal Credit Union membership 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.

- Verify your direct deposits and automatic payments have begun posting to your new account, before closing your previous accounts.

**Account Closing Request Form**

Send written notice to your old financial institution informing them you are closing your account.