White River Credit Union Account Switch Checklist

Moving your account might seem like a big undertaking, but it will be worth it. This checklist will help to simplify the move for you. Call us at 802-767-3333 if you need help.

1. Get your paperwork in order:

    1. Financial statements from your previous financial institution, you will need this information to make the switch to WRCU.
        a. Make a note of all your automatic deductions and list them below.
        b. Make a note below of any direct deposits, payroll, Social Security, or other deposits.
    2. Get your account number and routing information from your old financial institution, or you can find this information on a check.

Old Routing #	
Old Account #	
WRCU Routing #	211691279
WRCU Account #	

My automatic deductions and deposits:

2. Stop using your old account and check to see all your checks clear.

3. Fill out the Direct Deposit Authorization for <u>each</u> direct deposit and submit it to the appropriate payers. For Social Security direct deposits contact them at 800-772-1213 or see the instructions at https://www.ssa.gov/deposit/howtosign.htm

4. Fill out the Automatic Withdrawal Authorization for <u>each</u> automatic withdrawal and submit it to the appropriate company taking automatic withdrawals, (insurance, phone, etc.) You might want to consider using WRCU Bill Pay for your automatic payment. See our website or talk with any MSR for details.

White River Credit Union
96 North Main St - PO Box 419 - Rochester, VT - 05767
802-767-3333
www.whitercu.com

5. If you are using an automatic bill pay other than direct account withdrawal, make sure these bills are paid up and switch to WRCU online Bill Pay. See how to get started with WRCU Bill pay at https://www.whitercu.com/online-services/online-banking

6. Check your statements from your previous financial institution to make sure all your checks have cleared.

7. Fill out the Account Closure Request and submit it to your old financial institution.