



Switching Your Account(s) Checklist

1. Open your new UnitedOne Credit Union checking account at any of our local offices.
Manitowoc 920-684-0361 or **Sheboygan** 920-451-8222
2. Stop actively using the account you want to close at your other financial institution.
As soon as possible, **stop the following** to allow all transactions to clear and a final balance amount to be determined.
 - Stop - Writing Checks
 - Stop - Initiating Payments
 - Stop - Using your ATM/Debit Card
3. Establish or switch Direct Deposit(s), or any automatic payments to your new UnitedOne Credit Union account.
4. Notify any sources that deposit funds into your old account that you are switching your checking account to UnitedOne Credit Union.

To set up direct deposit, you will need:

- Your new UnitedOne Credit Union 10-digit account number and routing number 275979173
 - Fill out our Direct Deposit Change Form
 - Institution's or company's address and phone number. Once you have this information, complete our deposit form and send it to the company(s) that makes the deposit into your account.
5. Transfer your Automatic Withdrawal Payments such as recurring loan payments, internet service providers, reoccurring payment, memberships, etc. from your former checking account to your new UnitedOne Credit Union account.

The following items will be needed:

- A copy of your latest billing statement with your billing information
- Your new UnitedOne Credit Union 10-digit account number and UnitedOne Credit Unions routing number 275979173
- The Automatic Withdrawal Payments Change Form (Our form)
- Former bank account information (for canceled payments)

Once you have the necessary information to or transfer your automatic payments, complete the Automatic Withdrawal Payments Change Form and send it to your biller.

6. Finally close your former checking account. Once your last check, automatic deposits/withdrawals, and automatic payments have cleared, you are ready to close you former account.

To instruct your former financial institution to close your account, you will need:

- Your old financial institution checking account and routing number
- Your old financial institution address and phone number
- Checking/Savings Account Closure Request (our form)

It's that SIMPLE. Contact UnitedOne Credit Union with any questions!

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