



SWITCHING FINANCIAL INSTITUTIONS CHECKLIST

We are so glad you've chosen CWPCU and we are here to help you through the transition. Please use this checklist to guide you through the process of establishing your new accounts at CWPCU and closing accounts at your previous financial institution.

- Open your new Crow Wing Power Credit Union checking and/or savings account and make your initial deposit.
- Sign up for online banking and install the CWPCU mobile app
- Ensure enough funds are available in your old account at your previous financial institution to cover automatic payments or checks that have not processed yet.
- Send written notice to direct deposit vendors (employer, social security, etc.) directing them to send your deposits to your CWPCU account.
- Send written notice to the vendors who directly debit your account for auto-payments (rent or mortgage, utilities, insurance, streaming services, etc.)
- Confirm all direct deposits have begun in your CWPCU account.
- Confirm all direct deposits have stopped in your old account.
- Confirm all auto-payments have moved to your CWPCU account.
- Confirm all auto-payments have stopped from your old account.
- Confirm all checks have cleared from your old account.
- Close your account at previous financial institution.

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To ensure all direct deposits and auto-payments are managed while making the switch, use the sheet below to identify what needs changing.

Deposits	Company Name	Account Number	Phone	Status
Payroll				
Pension				
Social Security				
Other				
Other				
Other				

Payments	Company Name	Account Number	Phone	Status
Mortgage				
Auto				
Auto				
Insurance				
Insurance				
Internet				
Cell Phone				
Electricity				
Gas				
Water				
Other				