

Final Check List

Now that your forms are filled-out, the hardest part of switching to Chaco Credit Union is over. Use this list to check off and confirm the items you have completed.

- o Join Chaco Credit Union (if you're currently not a member)
- o Confirm all your checks have cleared your old checking account
- o Forward the "Step One" form to your payroll department
- o Forward the "Step Two" form(s) to merchants/payees who take automatic payments from your checking account

Here's a list of possible direct deposits and automatic payments that may be made from your account:

Direct Deposits

Payroll
Social Security
Government
(contact us for proper form)
Other

Automatic Payments

Mortgage
Insurance
Loans
Investments
Cable
Telephone
Other

- o Once you confirm all your direct deposit and automatic payments have been forewarned to your new Chaco account, send the "Step Three form" to your old financial institution to close out your checking account(s).

Now, it's time for you to start enjoying all the benefits of a Chaco Credit Union checking account.