

Switch your checking account in 5 steps!

Track your Progress

1 Open your new Austin FCU account in person at our branch or online at www.austinfcu.com.

My Austin FCU account is open, and I have received my new debit card and/or checks.

2 Stop using your old checking account(s), and allow time for outstanding payments and checks to clear the account(s). Don't forget to stop any scheduled Bill Pay payments or automatic drafts.

I have set up my Online Banking profile with Austin FCU.

I have stopped using my old account, and I have enough funds in the old account for all items to clear (checks, ACHs, Bill Pay items, debit card transactions)

Set up your direct deposit(s) with your employer or retirement plan. You may need to provide a voided check.

3 Routing Number: **314977418**
Checking Account Number:

I have updated my direct deposit information.

Visit GoDirect.gov or call 800-333-1795 to update your Social Security Direct Deposit.

I have updated any automatic payments using my debit card to my new Austin FCU debit card.

4 Change your automatic payments. We recommend printing or downloading your most recent checking statement, using this statement to write a list of all the changes needed. *We have included a written list to get you started.*

I have updated any automatic ACH payments and Bill Pay items to my new Austin FCU account.

5 When all of your pending payments have cleared your old account, and you see that your automatic payments and direct deposits are coming into the new account, close the old account using the form provided. *Your other bank/credit union may require their own form.*

I have verified that all pending items have cleared my old account.

I have closed my old account.

Direct Deposit & Payment Change Tracker

Use your old account statement and/or transaction history to fill out what items you need to change over to your new Austin FCU account. This chart can help you keep track of contact information and which items you have completed the switch for.

Deposits	Company Name and Info	Completed
Payroll		
Payroll		
Pension or Social Security		
Other		

Automatic Payments	Company Name and Info	Completed
Mortgage/Rent		
Car Payment		
Car Payment		
Insurance		
Insurance		
Phone		
Electricity		
Gas		
Water, Sewer, Trash		
Cable/Internet		

Direct Deposit & Payment Change Tracker

Automatic Payments	Company Name and Info	Completed
Credit Card		
Credit Card		
Credit Card		
Loan		
Loan		
Streaming Services		
Subscriptions		
Other: _____		
Other: _____		
Other: _____		
Other: _____		
Other: _____		
Other: _____		
Other: _____		
Other: _____		
Other: _____		

Authorization to Close Account

Date: _____

To: _____

From: _____

Account Number (s): _____

I hereby authorize the above listed account(s) be closed. Please mail any remaining funds in these accounts to me at the above listed address.

If there are any questions I can be reached at
_____.

Signature(s):

Printed Name(s):

Direct Deposit Form

Use this form to set up or transfer recurring direct deposits to your Austin FCU account. Recurring direct deposits include regularly scheduled paychecks or other income from retirement plans, investments, pension plans, etc. After completing this form, attach either a preprinted voided check or letter of verification for your new Austin FCU account to this form and submit it to your employer or other income source for processing.

Be sure to:

- Check with your employer or the other income source to ensure no other forms are required to process your request.
- Keep your account at your previous financial institution open until you confirm that your direct deposit has been redirected to your Austin FCU account.
- Contact your employer or other income source to inquire about the delay if your deposit has not been redirected after three pay periods.

INSTRUCTIONS FOR EMPLOYER/OTHER INCOME SOURCE

I would like my income automatically deposited into my Austin FCU account as instructed below:

Please Establish Direct Deposit Change account used for direct deposit

Employer/Company Name _____

Employer/Company Address _____

Personal Information

Name (First, Middle, Last) _____

Street Address _____

Phone _____ Email _____

Austin FCU Account Information

Direct my payment to this Austin FCU account: Checking Savings

Austin FCU Routing # **314977418** Austin FCU Account # _____

Authorization

I authorize _____ (employer/company) to make deposits directly to my Austin FCU account indicated above and to make adjustments for any credit made in error to my account if necessary. This authority will remain in effect until I have given written notice to terminate this service.

Signature

Date

