

# ACCOUNT SWITCH KIT

Switching your accounts to FORUM Credit Union can be as easy as **1** **2** **3**.

From opening your new FORUM account to setting up automatic deposits, this checklist will help you simplify the process!

## **1** Open your new FORUM Credit Union account:

- You can apply for a Basic Savings, Checking or Health Savings Account [online](#).
- Or, visit a [branch location](#) near you.

## **2** Establish your FORUM Credit Union Account to fit your needs:

- Change/Set-Up direct deposit to your account
  - Use this helpful [form](#)
  - To change your Social Security deposit, call 1-800-772-1213, or visit <https://www.ssa.gov/deposit/howtosign.htm>
  - FORUM's Routing Number is 274074037
- Change and set-up automatic payments from your account
  - Be sure to change existing automatic payments from your old institution to FORUM
  - Save time by setting up new automatic withdrawals for items including utilities, Netflix, and Amazon purchases
- Activate and use your debit card and enroll in FORUM's secure online banking program, [CU Online](#)
  - Manage accounts, set up alerts, pay bills and more
  - Download our mobile banking app on your Apple or Android device

## **3** Stop using and close your former bank account:

- Stop writing checks, initiating payments and using your ATM/Debit Card associated with your old account
- Make sure there are enough funds available to cover any scheduled payments
- Contact your old institution to close your account
  - Verify that all transactions have cleared your old account
  - Verify that your direct deposits are being made to your new FORUM account

It's that easy! Now enjoy the [perks](#) of being a FORUM Credit Union Member and [contact us](#) with any questions!

