

easy switch checklist

Don't stay at your current financial institution just because you think it's too hard to switch. That might be the case at other places, but MemberSource Credit Union makes it easy. We've put together this **Easy Switch Checklist** to guide you each step of the way.

Once you open your accounts, use this checklist to make sure you don't forget anything. This list will help you remember everything from direct deposit of your paycheck to switching your auto debits for things like your toll tag or utility payments.

close previous account

Since you've opened a MemberSource account, you can stop using your old one. To do this, stop writing checks and using your ATM or Debit card. Make sure all of your checks have cleared and all of your deposits and withdrawals have been accounted for.

After you've confirmed everything has cleared, submit written notification to your bank that you wish to close your account. They will likely need the names of all account owners, your account number(s) and your signature. Be sure to inquire as to their policies for closing accounts.

If you would like the balance of your old account sent to us, include your name and MSCU account number and have it mailed to:

MemberSource Credit Union
10100 Richmond Ave
Houston, TX 77042

Now you can move through the rest of the easy steps. If at any time along the way you have a question, please feel free to contact Member Services at 713.627.4000 or 800.877.8828.

automatic payment change reminder

As you transition your account to **MemberSource Credit Union**, it is important to verify that all automatic payments are switched. Consult the automatic payment checklist below to determine which companies you need to notify that you have switched your checking account.

Automatic Payment Checklist

- | | | |
|---|---------------------------------------|---------------------------------------|
| <input type="checkbox"/> Mortgage | <input type="checkbox"/> Credit Cards | <input type="checkbox"/> Internet Svc |
| <input type="checkbox"/> Auto Loan(s) | <input type="checkbox"/> Utilities | <input type="checkbox"/> Health Club |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> TV/Cable | <input type="checkbox"/> Investments |
| <input type="checkbox"/> Auto Insurance | <input type="checkbox"/> Home Phone | <input type="checkbox"/> Toll Tag |
| <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Cell Phone | <input type="checkbox"/> Other |



reminder to switch direct deposit

As you transition to MemberSource Credit Union, you'll definitely want to switch your direct deposit. It is important to verify that no deposits or payments are omitted. For paychecks, it can take up to 2 or more pay periods to take effect. Be sure to consult your HR department if you have any questions.

Here are some typical direct deposits you'll want to be sure to switch:

- Payroll
- Social Security
- Government Payments
- Retirement Benefits
- Investment Payments

You'll need to provide the following information when switching your direct deposit payments:

MemberSource Credit Union
ACH/Routing Transit Number: 313084904
Checking Account Number: _____

account access services

- Order a Visa® Debit Card for Account owners
- Set up Online Banking/Mobile Banking
- Set up Telephone Banking
- Set up e-Statements
- Order first set of checks

request for more information

- | | |
|---|---|
| <input type="checkbox"/> Savings Options | <input type="checkbox"/> Safe Deposit Boxes |
| <input type="checkbox"/> Visa® Credit Cards | <input type="checkbox"/> Auto Loans |
| <input type="checkbox"/> Online or Mobile Banking | <input type="checkbox"/> Rates |
| <input type="checkbox"/> Mortgage Loans | <input type="checkbox"/> Investments |
| <input type="checkbox"/> Home Equity Loans | <input type="checkbox"/> BillPayer |
| <input type="checkbox"/> Surcharge-free ATMs | |

