

# Financial Switch Kit

We make it easy. Make the hassle-free switch to TruStone!



Switching your account to TruStone Financial Credit Union is fast and easy. We'll give you everything you need to get started. Simply follow the steps below:

## Step 1 < Become a member with a TruStone share savings account

## Step 2 < Open a new TruStone checking account

Choose the right checking account that fits your needs:

- TruRate Checking
- Value Checking
- Premium Checking
- Business Checking

## Step 3 < Customize with convenient services

- Mobile App
- eStatements
- Debit Card
- Online Banking
- Online Bill Pay
- Checks

## Step 4 < Switch automatic deposits and payments

Review the Direct Deposit and Payment info provided by your local branch and the Switch Checklist on the next page – which will help you remember all your automatic payments and deposits for your account.

Contact any financial institutions, utility services, and other companies where you have automatic transactions set up. Relevant TruStone information is available at bottom of page.

Need help? Contact the banker who helped open your account or call us at 763.544.1517 or 800.862.1998. We'll go through the forms with you on the phone.

Now is the time to stop writing checks from your old checking account. Remember to allow any checks written against your account to clear before closing. We recommend leaving your old account open for at least 30 days to allow outstanding checks and automatic deposits/payments to clear. If you'd like, we can shred your old checks, deposit slips, ATM or debit cards.

## Step 5 < Close your old checking account

Contact your old financial institution and inquire about the closing process. Many banks and credit unions have a form to fill out and submit with your signature.

**Setting up a new payment from TruStone or a deposit to TruStone? Visit or contact your local branch for your savings and checking account numbers.**

Savings Account # \_\_\_\_\_ Checking Account # \_\_\_\_\_

Routing # 291075080

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# Financial Switch Kit

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## SWITCH CHECKLIST

We want to make sure you have a smooth transition to your new TruStone checking account. Keep this checklist as you complete the switch! Please remember to maintain a balance in your old checking account, to cover all outstanding checks and payments. TruStone Financial is not responsible for overdraft charges incurred for insufficient funds. However, we will do everything possible to help you avoid overdrafts during the time when you are transitioning accounts to us.

### Direct Deposits

- Payroll \_\_\_\_\_
- Social Security \_\_\_\_\_
- Government \_\_\_\_\_
- Retirement \_\_\_\_\_
- Investments \_\_\_\_\_
- Other \_\_\_\_\_

### Automatic Payments

- Mortgage \_\_\_\_\_
- Auto Loan \_\_\_\_\_
- Health Insurance \_\_\_\_\_
- Life Insurance \_\_\_\_\_
- Car Insurance \_\_\_\_\_
- Credit Card(s) \_\_\_\_\_
- Utilities \_\_\_\_\_
- Cable TV \_\_\_\_\_
- Cellphone/Telephone \_\_\_\_\_
- Online Services \_\_\_\_\_
- Investments \_\_\_\_\_
- Charitable Donations \_\_\_\_\_
- Other \_\_\_\_\_

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