

## Switch Your Account: Checklist

EASY AS 1-2-3-4

The following list is designed to help you make the switch to Winnebago Community Credit Union. Follow these few steps to get your accounts set up:

1. **Open a Winnebago Community Credit Union checking account** and record your number below **or have your WinCU member card on hand.**

Winnebago Community Credit Union Routing number: 275981174

- Receive and activate your debit card.
- Sign up for WinCU electronic services including: Online Branch, Mobile Branch, Bill Pay, eStatements, and Credit Score by Savvy Money. **See details on Page two**

2. **Complete a change of direct deposit form with your employer**

- Ask your employer about how to make this change, you may need a voided check from your new checking account.
- Other common direct deposits: pension(s)/retirement, Social Security ([ssa.gov/deposit/howtosign.htm](http://ssa.gov/deposit/howtosign.htm)), or investment income.

3. **Change your automatic payments.** Use your last few months' bank statements to determine what payments need to be switched. Complete and send an Automatic Payment Change Request form to the company. Note: Many companies have their own forms (paper or online), so please check with those companies on their process. Here is a list of common automatic payments:

- |                |            |                                 |                  |
|----------------|------------|---------------------------------|------------------|
| • Auto Loans   | • Daycare  | • Health Club                   | • IRA/Retirement |
| • Cable/TV     | • Electric | • Insurance: Home/Car/Pet/Other | • Mortgage/Rent  |
| • Cell Phone   | • Garbage  | • Internet Provider             | • Telephone      |
| • Charities    | • Gas/Oil  | • Investments                   | • Water/Sewer    |
| • Credit Cards |            |                                 |                  |

### Don't forget about your online profiles

P2P Payments - edit these in your profile using your new WinCU checking and routing number.

Billpayments - if you use payee websites to pay bills, next time you visit update your payment information.

Online Shopping - next time you visit sites like Amazon, Cabela's etc. update your payment information.

4. **Close your other account**

Make sure all checks and withdrawals have cleared (sometimes it can take two to three billing cycles before an automatic payment has been changed, be sure to confirm).

Remove all remaining funds from your old account and transfer to your new Winnebago Community Credit Union account.

Contact your previous financial and inquire on the process for closing your account, it might require a branch visit.

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**You're on the go...take your accounts with you! Manage your funds simply, securely, and smartly with our free e-Services including: Online Branch, Mobile Branch, Bill Pay, Credit Score by Savvy Money, and eStatement. The following services are just a click away:**

### ***Online Branch***

Go to our website: [www.WinCU.org](http://www.WinCU.org) and click on "Sign Up" at the top and provide the requested information. Check box to agree with terms and click on "Sign Up". A temporary password will be emailed to you, then follow instructions to complete registration.

#### ***Here is the information you will need:***

- A case sensitive, minimum eight (8) character password containing minimum one capital and one lower case letter, one number and a special character (! @ # \$ %)
- A confidence word that you will see every time you login.
- Answers to three security questions periodically required to answer. (answers are not case sensitive)

### ***Mobile Branch***

Our mobile branch brings all the features of the Online Branch to your mobile device! It's a convenient, secure service providing access to your accounts from web enabled wireless phones. Our FREE App specifically designed for optimal viewing on mobile devices including:

- Same login ID and password as your Online Branch.
- Apps available for Android and iPhone.
- **Winnebago Community's mobile app is available FREE, look for us on GooglePlay and the App store.**

### ***Online Bill Pay***

Pay all your bills in seconds and conveniently in one place with our FREE online Bill Pay. From utility bills to babysitters, you can virtually pay all your bills within a few easy clicks including:

- Pay bills electronically - payments are deducted from your checking account
- Person-to-person payments
- Place monthly bills directly into Bill Pay with eBill

**To get started click the Bill Pay tab in the Online Branch!**

### ***FREE eStatement***

Get rid of all the extra paper in your filing cabinet and sign up for eStatements today. They are an electronic version of your paper statements. Once you enroll in the Online Branch, you will automatically receive eStatements. If you wish to change this feature, you can do that within the Online Branch. **Simply click on the "Statements" tab at the top.**

### ***Credit Score by Savvy Money***

Staying on top of your credit score has never been easier. Access your credit score, full credit report, credit monitoring, financial tips, and education. All of this without impacting your credit score. You can do this **ANYTIME and ANYWHERE and for FREE.**