

To do:

1. List new accounts at Security Service Federal Credit Union:

Account Numbers: _____

Routing Number: 314088637

2. Switch payroll direct deposit/automatic deposits:

- Employer deposit
- Government deposit
- Brokerage deposits
- Child support or court-ordered deposits
- Other

3. Switch or stop all automatic payments/withdrawals:

- Insurance
- Mortgage/Rent
- Utilities
- Internet services
- Investments
- Auto
- Telephone
- Cable/Satellite
- Credit cards
- Other

4. Close all other savings, checking and electronic bill pay accounts:

Institution name(s): _____

Make sure all outstanding checks, debit transactions and automatic payments/withdrawals have cleared:

Outstanding check payable to:	Outstanding check number:	Outstanding amount:	Date cleared:

5. Other options to explore:

- Refinance auto loan to Security Service FCU
- Refinance mortgage loan to Security Service FCU
- Transfer high-rate credit card balances to Security Service FCU
- Transfer IRA or my old 401(k) to Security Service FCU
- Make an appointment with Security Service Investment Group