



Checklist

Switching Your Checking

Getting a new checking account shouldn't be difficult. Use this guide to maximize the benefits of your checking account and to make switching accounts less stressful.

Linking these essential payments and auto-drafts to your new account will help you stay current with your payments and make it easier to manage your money.

Monthly Staples

- | | |
|--|----------------------------------|
| <input type="checkbox"/> Rent/Mortgage | <input type="checkbox"/> Phone |
| <input type="checkbox"/> Utilities | <input type="checkbox"/> Wi-fi |
| <input type="checkbox"/> Insurance | <input type="checkbox"/> Vehicle |

Managing Your Finances

- ☐ Credit card payments
- ☐ Student debt payments
- ☐ Transfers to savings accounts
- ☐ Retirement plan contributions

Discretionary Spending

- ☐ Video streaming services
- ☐ Gym membership
- ☐ Music/audio streaming

Checking Tips

If you haven't already, set up overdraft transfers on your account.

Set up multiple accounts with nicknames to help organize your spending and savings (e.g. set up a savings account named "Travel Fund").

Set up direct deposit to have your paycheck automatically transferred to your account.

Other Important Information

Routing #: 307070005

For your account number or direct deposit form, login to online or mobile banking.

Have a question?

Visit one of our service centers or call us at 800-525-9623

