

Switch Kit Checklist

We'll make it quick and easy to switch your accounts to Meridian Trust Federal Credit Union. Simply use this handy checklist to help you make the switch.

Have your Meridian Trust FCU account number(s) ready when completing the authorization forms in the switch kit.

Account Number: _____

Meridian Trust FCU's Routing Number: 307086701

1. Gather information to switch direct deposits/automatic deposits using the **Authorization to Change Direct Deposit:**

- | | |
|---|--|
| <input type="checkbox"/> Employer deposits | <input type="checkbox"/> Brokerage deposits |
| <input type="checkbox"/> Government deposits | <input type="checkbox"/> Child support or court-ordered deposits |
| <input type="checkbox"/> Social Security Administration | <input type="checkbox"/> Other |

2. Gather information to switch automatic payments/withdrawals using the **Authorization to Change Automatic Withdrawal:**

- | | |
|--|---|
| <input type="checkbox"/> Mortgage/Rent | <input type="checkbox"/> Auto |
| <input type="checkbox"/> Association fees | <input type="checkbox"/> Club/Membership dues |
| <input type="checkbox"/> Internet service | <input type="checkbox"/> Cable TV/Satellite |
| <input type="checkbox"/> Investments | <input type="checkbox"/> Credit Cards |
| <input type="checkbox"/> Utilities: electric, gas, water | <input type="checkbox"/> Phone/Cell phone |
| <input type="checkbox"/> Online billing | <input type="checkbox"/> Other |

3. Close any unnecessary savings, checking and bill payment accounts using the **Authorization to Close Account:**

Other financial institutions (Name and Address):

4. Transfer high-rate credit card balances to your Meridian Trust FCU VISA using the **Authorization to Transfer Credit Card Balances:**

Credit cards to transfer (card number):

5. Additional money-saving options to explore:

- Refinance your auto loan at Meridian Trust FCU
- Refinance your mortgage loan at Meridian Trust FCU
- Tap your home's equity with one of Meridian Trust FCU's home equity services, including our convenient Home Equity VISA

