



Thank you for choosing TFCU as your financial institution! We are committed to offering an extensive range of products and services designed specifically with you in mind! We want to make your banking experience as easy as possible by giving you convenient access to manage your accounts on the go, all while providing you with the latest and greatest banking technology and exceptional member service.

Switching to TFCU is easy with the help of our Switch Kit! Just follow the checklist below and complete the necessary forms to close your old account and get started with TFCU!

#1 OPEN YOUR NEW ACCOUNT AT TFCU

- Have your Social Security Number & a government issued ID (Driver's License, Passport, etc.) handy
- Complete the Membership Application in one of our branches or online at www.tauntonfcu.com
- Enroll in eServices: Online Banking, eStatements & eNotices
- Download the Mobile App by visiting your smartphone's app store

#2 SWITCH YOUR AUTOMATIC WITHDRAWALS

Fill out the Automatic Payment Authorization Form for each of your automatic transactions. Completed forms should be submitted to each merchant/payee that handles your automatic withdrawals. Remember to update any payees who you've provided with your debit card. Here's a list of common types of automatic withdrawals to assist you:

Utilities	Bills/Payments
<input type="checkbox"/> Gas & Electric <input type="checkbox"/> Telephone <input type="checkbox"/> Cable and/or Internet <input type="checkbox"/> Water <input type="checkbox"/> Trash	<input type="checkbox"/> Mortgage <input type="checkbox"/> Loans <input type="checkbox"/> Insurance <input type="checkbox"/> Court Issued Payments <input type="checkbox"/> Other: _____

#3 SWITCH YOUR AUTOMATIC DEPOSITS

Fill out the Direct Deposit Form for each of your automatic transactions. Completed forms should be submitted to each company and/or financial institution that handles your automatic deposits. Here's a list of common types of direct deposits to assist you:

<input type="checkbox"/> Employer(s) <input type="checkbox"/> Social Security <input type="checkbox"/> Pension Accounts	<input type="checkbox"/> Brokerage Deposits <input type="checkbox"/> Child Support <input type="checkbox"/> Other: _____
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#4 CLOSE YOUR OLD ACCOUNT

Before closing your old account, be sure to leave enough money to cover any outstanding checks, automatic debits, or purchases.

Once ready, complete the Account Closure Form and send to your previous financial institution to complete the process.

#5 WELCOME TO TFCU!