



NEW MEMBER SWITCH KIT

Your financial transition made easy!

Compass CU Routing Number: 272485136

Your Compass CU Account Number: _____

Direct Deposit

Do you receive funds directly into your account from your employer, social security, VA, trust, etc.?

If so, you will want to change your deposits to your new Compass CU account. Below are some of our accounts that you have the option to deposit into:

Checking (xxx)

Amount:

Savings (xxx)

Christmas Club (xxx)

Other (xxx)

Do you have **AFT's (Automatic Funds Transfers)**, **ACH's/EFT's (Automatic Clearing House/Electronic Funds Transfers)**, or **Online Bill Payments** through your other Financial Institution?

If so, we have provided a checklist to help keep track of what needs to be switched as you transition over to Compass CU.

Companies:

- ☐ Credit Cards
- ☐ Auto/Rec loans
- ☐ Personal loans
- ☐ Mortgage/Home Equity
- ☐ Insurance
- ☐ Utilities
- ☐ Monthly subscriptions

Joint Owner:

Beneficiary:

Joint Owners/Beneficiaries:

Final steps to wrap up!

- ☐ Enroll and complete Online Banking via our Mobile App or Website
- ☐ Set preferences for Mobile Banking Alerts
- ☐ Order and Activate Debit Card
- ☐ Order Checks
- ☐ Link your Mobile Wallet

How'd we do!?

Leave us a Google review and follow our social media platforms to stay up to date!

