

Account Switch Kit

Switching to UECU is easy!



My account

UECU checking account number: _____ (14 digits)

UECU Routing #: 231 385 633

UECU Address: Utilities Employees Credit Union
11 Meridian Blvd
Wyomissing, PA 19610

My Access



Online: Visit uecu.org and click on **Advantages Online™**. Click **Register** to get started.



Mobile: Visit your app store and download "UECU Mobile" for on-the-go access.

Link your accounts: Sign into your account online, click **Transactions**, then **Make a Transfer or UECU Payment**, and choose **My External Accounts** on the left. Once your external account is verified, you can easily transfer funds to and from your old account and your UECU account. You can also link accounts by mail by completing UECU's ACH Authorization Agreement found at uecu.org/forms.

Print your account information: Sign into your account online, click **Checking and Savings**, and choose **View Direct Deposit Information** to print proof of your new account to use in place of a cancelled check when needed.

Update Automatic Deposits

Review past deposit activity on your old account to complete this list and make a few calls or online changes each day until everything has moved to your new UECU Account.

Done!	Deposit Source	Transaction Information			Date Changed
		Date	Frequency	Amount	
	Social Security	<i>Call 1.800.772.1213 or visit ssa.gov/deposit</i>			
	Payroll Deposit				
	Employer Reimbursements				

Update Automatic Withdrawals/Payments

Review past withdrawal activity on your old account to complete this list and make a few calls or online changes each day until everything has moved to your new UECU account. In addition to your monthly bills and payments, don't forget your annual subscriptions, prescriptions, memberships, infrequent bills, etc.

Done!	Company	Account Number	Transaction Information			Date Changed	New Method (Billpay Debit Card, Autopay, etc.)
			Date	Frequency	Amount		
	Electric						
	Gas						
	Phone						
	Internet						
	Insurance						
	TV/Music						
	Road Toll Pass						

Close Your Old Account

When all automatic deposits and withdrawals have been successfully transferred to your new UECU account, complete and mail the attached **Account Closure Request Letter** to your old financial institution.

Customize Your New One

Automate your savings: schedule regular transfers from your new checking account to your UECU savings to make saving easier. Sign into your account online or via mobile app to create a transfer that occurs on a frequency of your choice. Changes to your savings plan are as easy as signing in and editing/deleting your planned transfers.

Pay your bills online: instead of giving companies permission to withdraw funds from your accounts, take control by setting up your bills in *Advantages Bill Pay*™. Sign into your account online to add your bills and receive electronic bills from participating companies. Quickly pay them online or with our mobile app, or schedule them to be paid on a future date.

Deposit checks online: deposit paper checks easily and at no cost. It's as easy as snapping a picture on your smart phone or tablet. Sign into your account with our mobile app and click **Check Deposit**. You can even receive instant access to a portion of your check! Learn more by watching the video found here: uecu.org/aotips.

Set up account alerts: with *E-Notifications*™ account alerts, you can receive an automatic email or text message* notifying you of current activity and upcoming due dates on your UECU accounts. Learn about the different kinds of alerts you can receive here: uecu.org/aotips.

Make loan payments easier: UECU regularly refinances loans to help members save money and time. Better rates make smaller payments possible, and automated payments make sure they are paid on-time, every time. Call our Financial Service Consultants to see how UECU can help you: 800.288.6423 ext. 4001. Apply via mobile app or online at uecu.org/loans.

*Alerts received as text messages on your mobile phone may incur a charge from your mobile service provider. Standard message and data rates apply.

****Account Closure Request****

Date: _____

Financial Institution: _____

Address: _____

To Whom It May Concern:

This letter is to inform you that I have decided to close the account(s) listed below as of this date: _____.

Account #: _____ Account type: _____

Account #: _____ Account type: _____

Account #: _____ Account type: _____

Account #: _____ Account type: _____

Please close the account(s) noted above and mail the balance and any interest earned, and confirmation of account closure to:

Name: _____

Address: _____

If you require any additional information, I can be reached at this number: _____
or at the address noted above.

Signed,

_____ (secondary account holder if applicable)