

Switch Kit Checklist

Switching your automatic deposits and withdrawals from your old institution to your new Idaho Central account is easier than you think. Simply follow these three steps.

1. **Step #1:** **Print** your latest account statement.
2. **Step #2:** **Categorize** your various account transactions using this form.
3. **Step #3:** **Contact** the companies you list below to change your account information.

Remember, Idaho Central is here to assist every step of the way. Stop by your local ICCU branch today and let us help.

Direct Deposit

A Direct Deposit is a recurring electronic deposit to your account. The most common types are paychecks from employers, Social Security checks, etc. To switch your Direct Deposit, complete and submit our Direct Deposit letter to your employer.

Check when
complete

Company Name

ACH Withdrawal

ACH withdrawals are automatic payments you have scheduled to come from your account. Examples could include automatic withdrawals for cable, utility, and insurance bills. To establish the ACH withdrawal, you may have submitted a voided check to the company or gave them your account and bank routing numbers. To notify these companies of your new Idaho Central account, log on to your account with them and request the change. Or, complete and submit our Automatic Payment Letter to the institutions you list below.

Check when
complete

Company Name

ACH Withdrawal Continued

Check when
complete

Company Name

Online Bill Payment

If you use Online Bill Payment to pay bills, you will need to add your payees to your new Idaho Central Bill Payment account. Before closing your Bill Payment account at your old institution, use this form to write down your current payee information. Then, set up new payees in your ICCU Bill Payment account in eBranch using this information.

Payee Name

Account #

Address

Check when
complete

Payee Name

Account #

Address

Check when
complete

Payee Name

Account #

Address

Check when
complete

Payee Name

Account #

Address

Check when
complete

Payee Name

Account #

Address

Check when
complete

Payee Name

Account #

Address

Check when
complete

Online Bill Payment Continued

Payee Name	_____
Account #	_____
Address	_____ _____ _____
<input type="checkbox"/> Check when complete	

Payee Name	_____
Account #	_____
Address	_____ _____ _____
<input type="checkbox"/> Check when complete	

Payee Name	_____
Account #	_____
Address	_____ _____ _____
<input type="checkbox"/> Check when complete	

Payee Name	_____
Account #	_____
Address	_____ _____ _____
<input type="checkbox"/> Check when complete	

Recurring Debit Card Withdrawals

These are automatically recurring withdraws you have established using your debit card. Typically these are routine monthly bills. Examples could include cable or utility bills, health club dues, etc. You would have given the company your debit card number to set up these transactions. Once you have your new ICCU debit card you will need to contact the companies you list below to give them your ICCU card information.

Check when complete

Company Name

Letter of Closure

Upon completion of these steps, submit a Letter of Closure to your old financial institution.

Institution _____

Account # _____

Address _____

If you have any questions, please contact your local Idaho Central branch.