

Account Change Worksheet

Start your better financial future today. Use this checklist to make the switch to First Education Federal Credit Union! We'll try to make it as easy as possible.

- For accounts with online access you will need the sign-on information. For other accounts, the information needed should be on your most recent statement from the company.

1. Get the information you need from us.

Your Information	
Account Number:	_____
	Savings Checking

Our Information	
Routing Number:	3070-8661-7
Address:	PO Box 20030 Cheyenne, WY 82003
Phone Number:	307-432-7400
Fax Number:	307-432-7432

2. Fill out **Authorization to Change Direct Deposit** form. You probably know the information required for this one, but you may need to talk to the person that handles your payroll. Don't forget to mail or turn in the form.
3. Get the last few months of account statements for your current account or, if available, sign on to their home banking website.
4. Look for any electronic deposits you may have missed. Common ones include:

Retirement	Social Security	Child Support
Investments	FSA/HSA Reimbursements	Online Sales
5. Get the information for any deposits you just found (online access information or statement).
6. Sign on to the website and replace the current information with the information on your First Education account. If needed, fill out an **Authorization to Change Direct Deposit** form and mail it.
7. If you currently use a bill payer service, sign on to that website and print/save the information for each active payment. You will use this information later to set up the payments in NetTeller.

Look through your statements/history for any non-debit card electronic withdrawals. Look through your last couple of months statements or history online so you don't miss any. Common ones include:

HOA Fees	Cell Phone	Internet Service	Credit Cards	Life/Health Insurance
Electricity	Home Phone	TV Service	Investments	Homeowner's Insurance
Natural Gas	Water/Sewer	Trash	Car Payment	Auto Insurance

*** Consider using our Bill Pay site to pay your bills. With it, you are in control of how much and when the payments are made.

8. Sign on to the website and replace the current information with the information on your First Education account for each of these withdrawals. If needed, fill out an **Authorization to Change Automatic Withdrawal** form and mail it.
9. Look through your statement/history one more time to find any recurring debit card withdrawals. Sign on to the website and replace the current information with the information on your First Education account for each of these transactions. If you cannot access an account online, contact the company directly.
10. Sign-on to NetTeller and click on the Bill Pay tab. Then click the +Payee button. Using the information from Step 6 set up your active payments but don't schedule any payments until you're sure your payroll is changed, or you've deposited enough money to cover the payments.
11. Once your payroll and other deposits are coming to us, sign on to NetTeller, click on the Bill Pay tab and schedule your payments.
12. Once all your automatic payments and deposit are coming to us, close any unnecessary savings, checking, and bill payment accounts by calling them or using the **Authorization to Close Account** form.

For more details or help switching your accounts – just ask us!
Visit our office or call 307-432-7400 and we'll be glad to help.

See the back of this Worksheet for other ways we may be able to make your financial future better.



Additional Ways We Can Help Improve Your Financial Future

Transfer high-rate credit card balances to us by applying for a Visa credit card.

Tap into your home's value with a Home Equity Line of Credit.

Refinance your auto loan to First Education Federal Credit Union.

Refinance your mortgage loan to First Education Federal Credit Union.



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Mailing Address: PO Box 20030
Cheyenne, WY 82003-7000

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Fax: 307-432-7423
Email: ms@firstedfcu.com
Website: firstedfcu.com

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