

# Switch Kit

Use these steps and checklists to transfer all your finances from your old bank to your new PEFCU account!

## STEP 1

Open your PEFCU Account(s).

<b>Bank Name and Address</b>			
<b>Routing (ABA) Number</b>			
<b>Savings (Share) Account Number</b>		<b>Minimum Savings Deposit Amount</b>	
<b>Checking (Share Draft) Account Number</b>		<b>Minimum Checking Deposit Amount</b>	
<b>Other Information</b>			

Don't forget to ask for or order these items for your new account if you need them:

- Debit card(s)
- Paper checks
- Deposit slips

## STEP 2

Change your direct deposit to your new PEFCU account. If you're a Publix Associate, you can find your direct deposit form on your employee portal at [www.Publix.org](http://www.Publix.org).

## STEP 3

Update all automated and pre-authorized payments with your new account information. Use this chart to document your payments.

Bill	Company	Amount	Effective Date of Change
Mortgage or Rent			
Utilities	Electricity		
	Gas		
	Water		
	Sewer		
	Trash/Garbage		
	Other Utility #1		
	Other Utility #1		
Taxes	Property		
	Federal Income		
	State Income		
Insurance	Home/Renters		
	Car/Auto		
	Life		
	Health		
Debt	Other Insurance		
	Home Equity		
	Credit Card #1		
	Credit Card #2		
	Credit Card #3		
	Student Loan		
	Car Loan		
Other	Other Loan		
	Home Phone		
	Mobile Phone		
	Streaming Service #1		
	Streaming Service #2		
	Streaming Service #3		
	Streaming Service #4		
	Gym/Fitness Membership		
Other #1			
Other #2			
Other #3			

## STEP 4

Update any external savings or investment accounts with your new account information if you intend to continue contributing to those accounts.

External Account Type	Bank or Company	Account Number	Routing Number (ABA)	Amount	Effective Date of Change
Savings Account #1					
Savings Account #2					
Savings Account #3					
Savings Account #4					
IRA					
401(k)					
Other Account #1					
Other Account #2					
Other Account #3					
Other Account #4					
Other Account #5					

## STEP 5

Close your old account(s). Make sure you've received the full amount of your remaining balance (if any). Contact the financial institution for information about their account closing policies.

## STEP 6

Destroy old forms and items related to your old account(s) including deposit slips, paper checks, and debit cards. Monitor your old account to make sure you haven't missed any payments or deposits that you need to move over to your new PEFCU account.

**Thank you for  
choosing PEFCU!**

## Additional Resources

Live Chat: [www.PEFCU.com](http://www.PEFCU.com)  
Member Contact Center: 800-226-6673

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