

Make the Switch *to get more.*

Moving your account to SESLOC Federal Credit Union is easy when you follow these steps. We're here to help you every step of the way.



1

Open

Your New Accounts

Not currently a member? Opening a HomeFREE Checking account is easy! Visit your nearest branch and a Member Services Representative will assist you. **Be sure to bring your personal information.**

Membership is established with a \$5 share savings deposit and a one-time \$5 membership fee. You may join if you live, work, worship or attend school in San Luis Obispo and Northern Santa Barbara Counties, or of someone in your immediate family is a SESLOC member. Membership in good standing is required for all credit union benefits. If you're already a SESLOC member, then you've paid your membership fee.

Personal Info Checklist

The USA Patriot Act requires financial institutions to verify your identity when opening an account. You and joint owner(s) will be asked to provide this personal information:

- ✓ Name
- ✓ Residential address
- ✓ Date of birth
- ✓ Social Security number
- ✓ And bring a current government-issued photo ID, such as a driver's license

2 Register For Online Banking

Once your branch visit is complete, register online at sesloc.org or download our mobile app. With Online Banking, you'll have access to your account at home or on-the-go. Plus, it is your portal to Bill Pay, mobile deposit, open transfers and more.

3 Switch Over Your Automatic Transactions

Start the switch by updating companies and financial institutions that handle your automatic deposits and withdrawals. Use this handy checklist to keep track of people you need to contact.

4 Close Down Your Old Accounts

Once you verify that outstanding checks have cleared and automatic withdrawals and direct deposits are redirected, you're ready to close your old account. This process may take several weeks. Log on to Online Banking to confirm each transaction has been redirected.

Once confirmed, close your old accounts. Destroy old checks, ATM/debit cards and deposit slips.

Check List for switching your account

Direct Deposit

- Employer (human resources)
- Retirement or pension payments
- Social Security Administration (800) 333-1795
- _____
- _____

(allow up to two pay cycles for direct deposit changes)

Automatic Withdrawals

- Mortgage company
- Homeowner's insurance
- Auto insurance
- Life insurance
- Gym membership
- Utility companies
 - Water Power Gas
- Mobile phone or landline company
- Cable or Satellite company
- _____
- _____

Automatic Charges to Debit Cards:

- Mobile wallets (Apple Pay, Samsung Pay)
- Video streaming services (Netflix, Hulu)
- Rideshare services (Uber, Lyft)
- Subscription deliveries or fees
- _____
- _____