



Freedom is yours.

## Switch Kit Checklist

At Freedom Credit Union, we make it easy to transfer accounts and join us! Use this handy checklist to help track your steps as you make Freedom yours.

Open Share Savings account and new checking account.

Enroll in online banking (Freedom@Home) and download our mobile apps (FreedomCU Mobile and FreedomCU Card Control).

Complete the [Change in Direct Deposit](#) form and bring it to your employer.

Complete the [Automatic Payment Checklist](#).

Use the Automatic Payment Checklist to complete the [Change in Automatic Payments](#) form (one for each regular payment).

Confirm receipt of all direct deposits into, and automatic payment withdrawals from, your new Freedom account(s).

Make sure all checks with your former financial institution have cleared.

Complete the [Close My Account](#) form and send it to your prior financial institution.

If you have any questions during the process, please call our Member Contact Center at (413) 739-6961 or (800) 821-0160 or visit any branch. We look forward to serving you as a new member of Freedom Credit Union!