



## “Make the Switch” Checklist

At Glass City Federal Credit Union, we want to make it as quick, easy and effortless as possible to switch your accounts to the credit union. Simply refer to this checklist to help you make the switch!

### What to bring with you:

- Valid driver’s license or state issued ID
  - If your address is different than stated on your ID please bring a current utility bill. If your name is different due to marriage, please bring your marriage license.
- A *second form* of identification is required, and may include one of the following:
 

<input type="checkbox"/> College Photo ID	<input type="checkbox"/> Military ID
<input type="checkbox"/> Major Credit Card	<input type="checkbox"/> Recent Pay Stub
<input type="checkbox"/> Recent Tax Return	<input type="checkbox"/> Social Security Statement
- \$25 must be deposited into your Glass City Federal Primary Share Account (S1). If you sign up for direct deposit, the \$25 may be transferred to your S1 from your first deposit.

### After opening your account, please consider the following changes that may need to be made:

1. Do you have any direct deposits/automatic deposits that will need to be switched?
 

<input type="checkbox"/> <b>Employer deposit</b>	<input type="checkbox"/> <b>Brokerage deposits</b>
<input type="checkbox"/> <b>Government deposit</b>	<input type="checkbox"/> <b>Child support or court-ordered deposits</b>
<input type="checkbox"/> <b>Social Security Administration</b>	<input type="checkbox"/> <b>Other</b>
2. Do you have any automatic payments/withdrawals that will need to be switched?
 

<input type="checkbox"/> <b>Mortgage/Rent</b>	<input type="checkbox"/> <b>Auto Loan</b>
<input type="checkbox"/> <b>Association Fees</b>	<input type="checkbox"/> <b>Club/Membership Dues</b>
<input type="checkbox"/> <b>Internet Service</b>	<input type="checkbox"/> <b>Cable TV/Satellite</b>
<input type="checkbox"/> <b>Investments</b>	<input type="checkbox"/> <b>Credit Cards</b>
<input type="checkbox"/> <b>Utilities: Gas, Electric, Water</b>	<input type="checkbox"/> <b>Phone/Cell Phone</b>
<input type="checkbox"/> <b>Online Billing</b>	<input type="checkbox"/> <b>Other</b>
3. Close all other savings, checking and bill pay accounts. List all financial institutions with current accounts:
 

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4. Transfer high-rate credit card balances to your Glass City Platinum Visa. List all credit cards you may be interested in transferring balances:
 

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5. Additional options Glass City Federal can offer:
 

<input type="checkbox"/> <b>Finance/refinance your auto loan</b>	<input type="checkbox"/> <b>Money-Market accounts</b>
<input type="checkbox"/> <b>Finance/refinance your mortgage</b>	<input type="checkbox"/> <b>Financial/retirement planning</b>
<input type="checkbox"/> <b>Open additional savings accounts, such as:</b>	
<input type="checkbox"/> <b>Christmas Club</b>	<input type="checkbox"/> <b>Vacation Club</b>

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