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Business Switch Kit Checklist

We've made it easy to switch your business account to DFCU Financial!

Use this step-by-step checklist to help you with the switch process. Print this checklist and as you complete items, check off the boxes on your printed copy.

<input type="checkbox"/>	Open your membership and establish an account at DFCU Financial. You may do this by visiting any of our convenient branch locations. Don't forget to: <input type="checkbox"/> Order Checks <input type="checkbox"/> Order a Debit Card
<input type="checkbox"/>	Access DFCU Online - The Business Online Administrator will receive an email once the Online Access Authorization has been processed. The email will contain initial credentials for DFCU Online access and must be used within 72 hours of receipt of the email.
<input type="checkbox"/>	Verify that all checks, debit card transactions and scheduled bill payments have cleared your old account(s). If they have not, make sure to leave enough money to cover any outstanding items.
<input type="checkbox"/>	Switch your automatic payments and withdrawals: <input type="checkbox"/> Mortgage/Rent <input type="checkbox"/> Auto <input type="checkbox"/> Association Fees <input type="checkbox"/> Supplies/Vendors <input type="checkbox"/> Club/Membership Dues <input type="checkbox"/> Internet Service <input type="checkbox"/> Cable TV / Satellite <input type="checkbox"/> Investments <input type="checkbox"/> Credit Cards <input type="checkbox"/> Utilities (Electric, Gas, Water) <input type="checkbox"/> Insurance <input type="checkbox"/> Phone / Cell Phone <input type="checkbox"/> Online Billing <input type="checkbox"/> ACH Withdrawal <input type="checkbox"/> Taxes <input type="checkbox"/> Payroll <input type="checkbox"/> Other: _____ <input type="checkbox"/> Other: _____
<input type="checkbox"/>	Verify that all outstanding items have cleared your account and that your direct deposits and automatic payments have begun posting to your new DFCU Financial account.
<input type="checkbox"/>	Close your old account – ask about our helpful forms to aid you in this process.
<input type="checkbox"/>	Additional options to consider: <input type="checkbox"/> Apply for a DFCU Financial Credit Card <input type="checkbox"/> Refinance your auto loan to DFCU Financial <input type="checkbox"/> Apply for a Mortgage, Term Loan, or Line of Credit <input type="checkbox"/> Merchant Services <input type="checkbox"/> Payroll Services <input type="checkbox"/> Insurance & Benefits <input type="checkbox"/> Speak to someone about Retirement Planning

Thank you for becoming a member of DFCU Financial! If you have any questions or need help, please contact us at 888.336.2700.