

Simple Steps to Switch



1 Open your new account

Visit any of our locations or click “Open an Account” on our homepage, reliantcu.com, to open your new Reliant Community Credit Union account. You will need the following information to complete the account opening process:

- Your old checking account information
- Details of existing automatic payments
(Note: Keep in mind that not all automatic payments that you have occur on a monthly basis. Some payments occur bi-monthly, quarterly, or even annually.)
- Details of existing direct deposits
- A current acceptable form of ID with photo (driver license or permit, passport, pistol permit or local law enforcement ID)

Balance your previous checking account and be sure to leave sufficient funds to cover any outstanding checks, debit card transactions, or pending automatic payments. Use the [Account Balance Worksheet](#) to help you determine your ending balance.

2 Switch your Automatic Transactions

After you receive your new Reliant Community Credit Union account number, fill out the [Direct Deposit Form](#) and/or complete an [Automatic Payment Authorization Form](#) for each automatic transaction. These forms should be submitted to the companies and financial institutions that handle your automatic deposits and withdrawals. If you have more than one automatic transaction, simply fill out one form for each. This may include:

Direct Deposit Sources

- Employers
- Government Deposit (social security, pension, retirement)
- Brokerage Deposits (dividends, interest)
- Transfers from other financial institutions (savings, checking, money market)
- Child Support or other court-issued deposits

Other Payments

- Mortgage(s)
- Child Support or court-issued payments
- Account transfers
- Loans (car, home equity, credit card)
- Brokerage – automatic investments
- Insurance (home, auto, renters)

Utility Payments

- Gas/Electric
- Telephone
- Cable/Internet/Satellite
- Cell Phone
- Water
- Trash

3 Close your old account

Once all of the outstanding payments and deposits have cleared from your old account and you are sure there will be no further activity, fill out the Account Closing Form and mail or fax it to your old financial institution. This form will instruct them where to send any remaining funds. For security and privacy reasons, shred the unused checks and deposit slips. Destroy all old ATM/debit cards by cutting them into several pieces or passing them through a capable shredder once the account is closed.

4 Enjoy your new Reliant account!

Stop by any of our nine convenient branches, visit us on the web at reliantcu.com, or call us at 800-724-9282 to learn about all of our valuable products and services, surcharge-free ATM access, and CO-OP Shared Branch locations. Like us on Facebook or follow us on Twitter to learn about Reliant’s community involvement and upcoming promotions.