

Welcome to Velocity!

Account Switch Checklist

- Review monthly statements**
List auto-drafts, direct deposits and outstanding transactions

- Update automatic drafts**
Change of automatic payment (draft) form available online at www.velocitycu.com
Select "Checking and Savings" and then "Switch Kit"

- Update and inform direct depositors**
Includes payroll departments, government agencies, and pension providers
Additional change of direct deposit form available online at www.velocitycu.com
Select "Checking and Savings" and then "Switch Kit"

- Ensure outstanding transactions clear prior to account closure**
See back page for tracking
Send Account Closure Request (enclosed)
Additional account closure form available online at www.velocitycu.com
Select "Checking and Savings" and then "Switch Kit"



**Don't forget
these switch-its!**

Automatic Draft/Deposit Checklist

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Company _____ Deposit/Draft Date _____

Contacted On _____ Notes: _____

Outstanding Transactions Checklist

Description _____ Amount _____ Date _____ Cleared _____

Description _____ Amount _____ Date _____ Cleared _____

Description _____ Amount _____ Date _____ Cleared _____

Description _____ Amount _____ Date _____ Cleared _____

Description _____ Amount _____ Date _____ Cleared _____

Description _____ Amount _____ Date _____ Cleared _____