

Switch Kit

SWITCH CHECKLIST

- Open Checking account with Shore United Bank.
- Sign up for Online Banking.
- Stop using your previous checking account.
 - o Stop writing checks
 - o Stop using Debit and ATM cards
 - o Stop making Online Banking payments
- Transfer all Direct Deposits to Shore United Bank. Examples of direct deposit include:
 - o Payroll
 - o Social Security
 - o Pension
 - o Government/Military
 - o CD Interest Payment
 - o Brokerage Deposits
 - o Child Support or court-issued deposits.
- Transfer all Automatic Payments from old account to Shore United Bank. Use the Automatic Payment Change checklist to help notify your vendors.
 - o Mortgage Company
 - o Homeowner's Insurance
 - o Auto Insurance
 - o Life Insurance
 - o Utilities Companies - electric, water or gas.
 - o Telephone Company
 - o Cell Phone Company
 - o Internet Service
 - o Cable Company
 - o Loan Payments
 - o Child Support or court-issued payments
 - o Brokerage - Automatic investments
 - o Account transfers
 - o Other
- Allow time for any outstanding checks, final direct deposits, and automatic payments to clear your old account.
- Make certain enough funds are available in your old account to cover the above transactions.
- Send a written notice to the old bank that you are closing the account.
- Enjoy your new account. Don't forget to visit any of our branches or Online at www.ShoreUnitedBank.com to learn about our products, services, and convenient ATM locations.