



SWITCH KIT

SWITCHING MADE EASY!

Thank you for choosing TFed as your financial institution! We are committed to offering an extensive range of products and services designed specifically with you in mind! We want to make your banking experience as easy as possible by giving you convenient access to manage your accounts on the go, all while providing you with the latest and greatest banking technology and exceptional member service.

Switching to TFed is easy with the help of our Switch Kit! Just follow the checklist below and complete the necessary forms to close your old account and get started with TFed!

#1 OPEN YOUR NEW ACCOUNT AT TFED

- ☐ Have your Social Security Number & a government issued ID (Driver's License, Passport, etc.) handy
- ☐ Complete the Membership Application in one of our branches or online at www.tauntonfcu.com
- ☐ Enroll in eServices: Online Banking, eStatements & eNotices
- ☐ Download the Mobile App by visiting your smartphone's app store

#2 SWITCH YOUR AUTOMATIC WITHDRAWALS

Fill out the Automatic Payment Authorization Form for each of your automatic transactions. Completed forms should be submitted to each merchant/payee that handles your automatic withdrawals. Remember to update any payees who you've provided with your debit card. Here's a list of common types of automatic withdrawals to assist you:

Utilities

- ☐ Gas & Electric
- ☐ Telephone
- ☐ Cable and/or Internet
- ☐ Water
- ☐ Trash

Bills/Payments

- ☐ Mortgage
- ☐ Loans
- ☐ Insurance
- ☐ Court Issued Payments
- ☐ Other: _____

#3 SWITCH YOUR AUTOMATIC DEPOSITS

Fill out the Direct Deposit Form for each of your automatic transactions. Completed forms should be submitted to each company and/or financial institution that handles your automatic deposits. Here's a list of common types of direct deposits to assist you:

- ☐ Employer(s)
- ☐ Social Security
- ☐ Pension Accounts

- ☐ Brokerage Deposits
- ☐ Child Support
- ☐ Other: _____

#4 CLOSE YOUR OLD ACCOUNT

Before closing your old account, be sure to leave enough money to cover any outstanding checks, automatic debits, or purchases.

Once ready, complete the Account Closure Form and send to your previous financial institution to complete the process.

#5 WELCOME TO TFED!

Connecting All Departments: (508) 824-6466 | www.tfed.com

Membership is established by opening a \$5 share/savings account and is available to anyone who lives, works, worships or attends school in Bristol, Barnstable and Plymouth Counties in Massachusetts; Bristol, Kent, Newport and Providence counties in Rhode Island; and the Rhode Island towns of Charlestown, Exeter, Hopkinton, Narragansett, New Shoreham, North Kingstown, Richmond and South Kingstown. Federally Insured By The National Credit Union Administration. Equal Housing Lender. EOE.