

To make switching to a SAFE checking account **easier** and **more convenient**, follow the four steps below.

1. Choose your free benefits:

- Sign up for SAFE Online Banking at safecu.org.
- Download the free SAFE Mobile App., which makes it easy to manage your account 24 hours a day. It's available for free from iTunes® on your Apple® device or from the Google Play™ store on your Android™ device.
- Set up Text Banking to keep in touch with your account on your mobile device.
- Sign up for free eStatements, so you can receive monthly statements online and access up to 36 months of account history.
- Enroll in Direct Deposit for faster access to your income. Give your employer or benefits provider your new SAFE routing number and your new checking account number. If needed, complete and send a **direct deposit change letter** with your new information.

2. Switch automatic deposits and payments:

- Be sure to set up all your automatic payments or deposits and provide billers with your new routing number and checking account number. Use our **easy checklist** to determine the billers you may need to contact.
- If needed, complete and send an **automatic payment change letter** to any company withdrawing payments on a regular basis.
- Review your account in SAFE Online Banking and watch for direct deposits and automatic payments to begin posting to your new SAFE account.

3. Switch bill payments to SAFE:

- List all your recurring bills, including payee/company name, address, phone number, and account number.
- When you're ready, log in to Online Banking, sign up for Bill Pay, and enter your payees' information. For your convenience, you can also receive many of your recurring bills online as eBills.

4. Close your previous account:

- Verify that all the checks drawn on your previous account have cleared.
- Remember to securely destroy your debit and ATM cards from your former financial institution, as well as any unused checks.
- Once all your automatic deposits and payments begin posting to your new SAFE account, contact your former financial institution to close your previous account. If needed, complete and send a **request to close account letter**.

To make your switch to SAFE as easy as possible, we've pre-filled commonly-used letters helpful with the switch process for you. If you have any questions or need help switching accounts, please use Live Chat on safecu.org or call **(916) 979-7233** or **(800) SEE-SAFE**.

Direct Deposit Checklist

Deposit Type	Company	Account Number	Amount	Date of Deposit
My Payroll				
Other Payroll				
Pension/Retirement				
Benefit Payment				
Investment Income				
Other				
Other				

Automatic Payment Checklist

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loan				
Auto Insurance				
Credit Card				
Credit Card				
Credit Card				
Store Card				
Electric				
Gas				
Cable/Satellite				
Internet				
Telephone				
Mobile Phone				
Water				
Garbage				
Health Club				
Investments				
IRA/Retirement				
Daycare				
Tuition				
Other				
Other				

Direct Deposit Change

Company Name

Address

City, State & ZIP

To Whom It May Concern:

Please change my entire direct deposit to the new financial institution listed below effective with the next scheduled deposit.

New Financial Institution SAFE Credit Union	New Routing Number 321173742	New Checking Account MICR #
New Financial Institution Address 2295 Iron Point Road, Suite 100 Folsom CA 95630-8765		New Financial Institution Telephone Number (916) 979-7233 or (800) SEE-SAFE

If you have any questions regarding this request, please contact me.

Sincerely,

Signature

Name

Address

City, State & ZIP

Daytime Phone

Automatic Payment Change

Company Name

Address

City, State & ZIP

To Whom It May Concern:

Please change my automatic withdrawal to the new financial institution listed below effective with the next scheduled payment.

Payment to Account Number	Amount <input type="checkbox"/> Minimum payment <input type="checkbox"/> Specific payment amount: _____	
New Financial Institution SAFE Credit Union	New Routing Number 321173742	New Checking Account MICR #
New Financial Institution Address 2295 Iron Point Road, Suite 100 Folsom CA 95630-8765		New Financial Institution Telephone Number (916) 979-7233 or (800) SEE-SAFE

If you have any questions regarding this request, please contact me.

Sincerely,

Signature

Name

Address

City, State & ZIP

Daytime Phone

Request to Close Account

Financial Institution Name

Address

City, State & ZIP

Re: Account # _____

To Whom It May Concern:

Please close my account and send a check for the entire balance to me at the address listed below.

If you have any questions regarding this request, please contact me.

Sincerely,

Signature

Name

Address

City, State & ZIP

Daytime Phone