



## Switch Checklist

- Open Checking account with Shore United Bank.
- Sign up for Online Banking.
- Stop using your previous checking account.
  - Stop writing checks
  - Stop using Debit and ATM Cards
  - Stop making Online Banking payments.
- Transfer all Direct Deposits to Shore United Bank.
  - Payroll
  - Pension Administrator
  - Government Entity
  - CD Interest Payment
  - Brokerage Deposits
  - Child Support or court-issued deposits.
- Transfer all Automatic Payments from old account to Shore United Bank.
  - Mortgage Company
  - Homeowner's Insurance
  - Auto Insurance
  - Life Insurance
  - Utilities companies- electric, water or gas
  - Telephone Company
  - Cell Phone Company
  - Internet Service
  - Cable Company
  - Loan Payments
  - Child Support or court-issued payments
  - Brokerage – Automatic investments
  - Account transfers
  - 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](http://www.ShoreUnitedBank.com) to learn about our products, services, and convenient ATM locations.