ACCOUNT SWITCH CHECKLIST

Thank you for choosing UniBank! We know you have a lot of options when it comes to banks, and we're glad you chose us. We created this checklist to help you remember all the steps you need to take to fully move your accounts over. If you need help along the way, don't hesitate to reach out to us.

1 Download the UniBank Mobile app.

Our Mobile Banking app makes banking on-the-go easier, so we recommend you visit the app store on your mobile device and search for "UniBank Mobile Banking." *(Ours has a purple icon.)*

To logon, use your online banking login information that was provided at account opening.

Download on the App Store

GET IT ON Google Play

2 Switch your direct deposits.

You will need your new UniBank account number and UniBank's routing number: 211372378. Some direct deposits you may wish to switch over include:

- Your Employer
- Government/Social Security
- Child Support/Court Payments
- Retirement/Pension/Dividends
- Automatic Transfers

List the direct deposits you would like to switch below, and check them off when complete.

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3 Switch any automatic payments.

- Mortgage/Rent/ Utilities
- Car payment/ Insurance
- Loans/Credit Cards
- Retirement/Pension
- Memberships/ Subscriptions/ Streaming Services

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4 Bill Payments.

Setup payees in the UniBank Mobile app or in Online Banking. Once you have setup all payments, be sure to cancel the payments from your previous bank.

5 Mobile Payments.

Link your UniBank account to mobile payment systems you use, including: Venmo, PayPal, Amazon, Samsung Pay, Apple Pay, etc.

6 Make sure your transactions clear.

Before you close your accounts at your previous bank, be sure that all pending transactions have cleared the account. This would include debit card purchases, online payments, and checks.

7 You did it!

You can now contact your prior bank to close your accounts and have the remaining balance sent to you to deposit into your UniBank account.

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