



■ TexasBayCU.org

Checking Account Switch Kit





6 Easy Steps to a Texas Bay Checking Account!



Open Texas Bay Checking Account

- Perks Checking, Premium Perks Checking, or Simply Checking? <u>CLICK HERE</u> to compare.
- Visit one of our 9 branch locations or open your account online now.



Stop Using Your Old Account

- Destroy unused checks, deposit slips, and ATM/Debit cards
- Keep open for 30 days to ensure all outstanding debits have been processed



Change Direct Deposits

- Use our <u>Direct Deposit Form</u> to change any payroll or other automatic deposits to your new checking account
- If receiving deposits from Social Security https://godirect.gov/gpw/
- If receiving deposits from a retirement fund, contact that organization for instructions



Change Automatic Payments

- Use the Automatic Payment Checklist (page 3 in this document) to identify and make the change
- Use the Automatic Payment Change form provided in this document to change automatic payments that cannot be changed online or by phone
- Check the past three months' statements for recurring charges to ensure all are caught



Sign Up for Digital Banking

- Instructions for setting up your Texas Bay Digital Banking account can be found on page 5.
- Once your online account is created make paying your bills easier by setting up automatic payments through our easy-to-use Bill Pay platform.



Close Your Old Checking

Contact your previous financial institution to close your old checking account. This
can be done either in person or by using the Account Closure Request form included
in this document.



Automatic Payment Checklist

☐ Subscriptions (Netflix, Hulu, etc.)
☐ Credit Cards
☐ Home / Auto / Life Insurance
☐ Loans
☐ Investments
☐ Health Clubs
☐ Charities
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To change your automatic payments to draft from your new Texas Bay checking account, each of these companies will need to be contacted individually. These companies may ask for a voided check from your new account, your account number, our routing number (313082935), and other information to verify you have proper access to this account.

If you need any assistance locating your account information, a Texas Bay Credit Union team member will be happy to assist you with this.



Automatic Payment Change Form

Complete and sign this form and send it to each merchant/payee you currently have withdrawals or payments automatically withdrawn from your old account.

Merchant/Payee Name:	
Address:	
City:	ST: Zip:
To Whom It May Concern: Please discontinue making payments fro	om my old account:
Financial Institution:	
Routing #:	Account #:
I hereby authorize any future automatic Bay Credit Union account:	payments to be electronically debited from my new Texas
Texas Bay Credit Union 12611 Fuqua St. Houston, TX 77034 713-852-6700	New Account #:
If you have questions about this request,	, please contact me.
Thank you for your cooperation,	
Signature:	Date:
Name:	
Address:	
	ST: Zip:
Phone #:	
Email:	









Set Up Your Digital Banking

Login Options:

Website: www.TexasBayCU.org – click on the LOGIN button

OR

App: Download the Texas Bay CU App



LOGIN





WEBSITE: Click Enroll



APP: Click Register

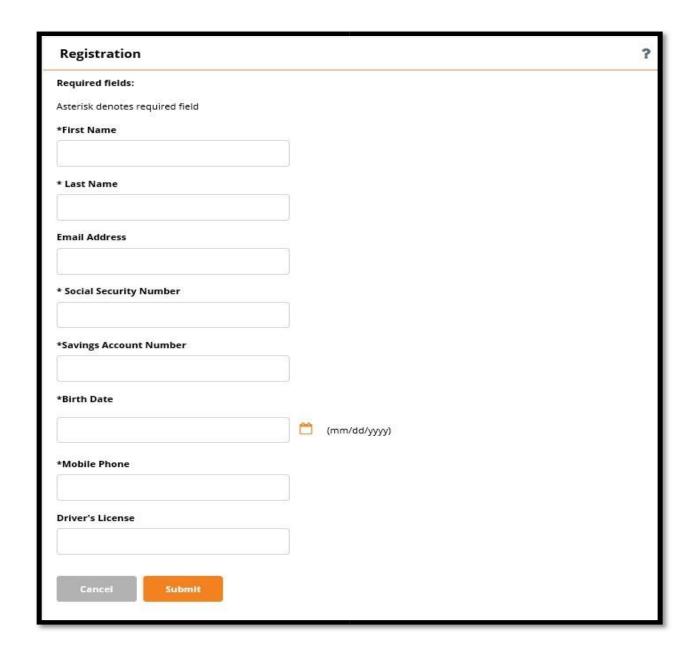




The below page will appear for you when registering for the first time.

Please make sure to complete all the fields with the asterisk *.

You will need your Share Savings Account Number.



Logging in the First Time:

In the form, we ask for your mobile phone number. You will receive a one-time passcode by text. Use this code to log in the first time. You will be able to set your own password upon the first login. Be sure to choose something you will remember!

Set Up Bio-Login!

If your smartphone allows the use of Face ID or your fingerprint to access your phone or other apps, then you can use this with our app, too! To set this up, simply tap on Face ID or the Fingerprint and follow the instructions. You will need to have already set up your User ID and Password.

If you are having trouble logging in please contact us at (713)852-6700.



Account Closure Request

Old Financial Institution Name:	
Address:	
	ST: Zip:
To Whom It May Concern, Please close my account(s) listed below:	
Account #:	Account Type: 🗆 Checking 🗆 Savings
Account #:	Account Type: 🗆 Checking 🗆 Savings
Account #:	Account Type: 🗆 Checking 🗆 Savings
Account #:	Account Type: 🗆 Checking 🗆 Savings
Forward the funds remaining in my account(s)) to:
 Me at the address below Texas Bay Credit Union 12611 Fuqua St. Houston, TX 77034 713-852-6700 	New Account #:
Name:	
	ST: Zip:
Phone #:	
Email:	
Signature:	Date:
Joint Owner Name (if applicable):	
Signature:	Date: