



# MAKING THE SWITCH TO ORION FINANCIAL

Use this checklist to make notes and stay organized as you make the switch to Orion Financial.

**Open an account online or in person.**

**Online:** Visit [OrionFCU.com](http://OrionFCU.com) and click open an account.

**In-Person:** Visit [Orion's Locations Page](#) to choose a branch location near you. Some locations offer instant ATM/debit card printing.

**Create your Online Banking account.**

An Orion team member will help create and verify your online banking credentials in person at the branch. Or, access online banking setup at [OrionFCU.com](http://OrionFCU.com).

**Activate your ATM/debit card.**

If you open an account online, an ATM/debit card will arrive within 7-10 days, followed by information containing your PIN. If you open your account at a branch, some locations offer instant ATM/debit card printing and activation. Remember: Never share your PIN with anyone.

**Fund your account.**

The simplest way to fund your new Orion account is to simply transfer funds from another account at a different financial institution. You can do this online using your new Orion account number and Orion's routing number (284084907), or simply write yourself a check.

## REFERENCE

Orion Financial Routing Number: 284084907

Member Connect Call Center: 901-385-5200

## GET THE APP



Access your accounts from anywhere, at any time using Orion Mobile App.

Download the version for your device (iOS and Android available) and log in using the same credentials as your Online Banking.

## DID YOU KNOW?

Orion is a not-for-profit credit union. Unlike banks, where shareholders get all the profits, members like *you* are our shareholders. Your savings are your shares in Orion. Profits made by Orion are returned to our members in the form of better rates, lower fees, and expanded services. Orion is also committed to giving back to our community. Welcome!

ORION FCU ACCOUNT NUMBER:

DEPOSIT AMOUNT:

FROM ACCOUNT:

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## MAKING THE SWITCH TO ORION FINANCIAL (cont.)

**Set up direct deposit.**

Contact your employer to get your paychecks redirected automatically into your new Orion account. This can take 1-2 pay cycles, depending on your employer.

**Set up Direct Deposit Switch.**

In online banking or the Orion mobile app, access Direct Deposit Switch under the Services tab. Direct Deposit Switch will guide you through the process of identifying and helping you switch recurring payments such as utilities and mortgage, making it easy.

**Switch over automatic payments.**

Identify payment sites and services that are connected to old accounts. Transfer these to your new Orion account. Some examples of this include apps, online shopping accounts, and entertainment services.

**Set up Bill Pay.**

Use Orion's Online Banking, or your biller's website to link monthly, recurring bills to your new Orion account. Some examples of this include loan payments, rent, utilities, credit card, memberships, etc.

**Close your old accounts.**

Once you've completed all of the above steps, you are ready to close your old accounts. Wait about a month to ensure that there are no unknown charges still being processed through your old account.

### WRAPPING UP!

Get written confirmation from your old financial institution that your account has been closed.

Don't forget to cut up your old debit cards and shred old checks.

### NOTES

**Monthly bills to move:**

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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Other payments to switch:**

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- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
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**Notes:**

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**OLD ACCOUNTS:**

**DATE TO CLOSE:**

**NOTES:**

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