



MAKING THE SWITCH TO ORION FCU

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

- Apply for Orion FCU membership online or in person.**
Online: Visit OrionFCU.com to apply online. The online application form will take 15-20 minutes. Allow about 30 minutes for your account to process before enrolling in Online or Mobile Banking.
In-Person: The in-person application process takes 30-45 minutes, including credential verification, ATM/debit card printing, and activation.

- Create your Online Banking account.**
Click the Online Banking button at the top of any page at OrionFCU.com. Or, your Orion member representative will help create and verify your online banking credentials in person.

- Activate your ATM/debit card.**
Your ATM/debit card will arrive within 7-10 days, followed by information containing your PIN. Or, a member consultant can instantly print and activate your card in any of our Orion branches.

- 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 digitally, or by writing yourself a check.

REFERENCE

Orion FCU Routing Number: 284084907

Member Connect Call Center: 800-532-9025

GET THE APP



Access your accounts from anywhere, at any time using Orion's mobile banking 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. Orion members are required to have a Share Account with at least \$25. 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. Welcome!

ORION FCU ACCOUNT NUMBER:	DEPOSIT AMOUNT:	FROM ACCOUNT:

MAKING THE SWITCH TO ORION FCU (cont.)

Set up direct deposit.

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

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.

Switch over automatic payments.

Identify 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.

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:

- _____
- _____
- _____
- _____
- _____
- _____
- _____

Other payments to switch:

- _____
- _____
- _____
- _____
- _____
- _____

My closest branch:

OLD ACCOUNTS:

DATE TO CLOSE:

NOTES:

