

Switch Kit Directions

You may check the boxes next to the items you have completed. Then print out and keep this checklist handy. As you continue completing items, simply check off the boxes on your printed copy.

Open your new Blue Foundry Bank checking account.

Make sure all checks have cleared on your checking account.

Make certain enough funds are available in your account to cover any automatic payments that may yet need to be withdrawn.

Send written notice to your direct deposit vendors (payroll, social security*, CD interest payments, etc.) of the changes in your relationship. (Use Direct Deposit Authorization Form)

*For Social Security direct deposits, changes may be made by calling the Social Security Administration at 1-800-772-1213.

Send written notice to your vendors who automatically take your payments from your checking account (utilities, insurance companies, internet service providers, banks, etc.) that you are closing the account.

Send notification of new account information to vendors who you want to continue to generate automatic withdrawals instead of paying by Bill Pay or use this notification to start a new paying by Bill Pay or use this notification to start a new automatic payment with a vendor. (Use Automatic Payment Authorization Form)

Send written notice to the financial institution that you are Closing the account. (Use Existing Account – Close Account Request Form)