Move Your Banking to WCU

A simple checklist to help you move your everyday banking.

1 OPEN YOUR WCU ACCOUNT

Bring these items to your appointment:

- ❒ Government-issued photo ID
- ❒ Recent statement from your current financial institution
- ❒ Payroll, pension, or government deposit information
- ❒ Lawyer Drawn Power of Attorney documents (if applicable)

2 UPDATE YOUR DIRECT DEPOSITS

- ❒ Payroll
- ❒ Pension, CPP / OAS
- ❒ GST, CCB, EI, Tax Refunds
- ❒ Rental or other recurring income

3 UPDATE YOUR AUTOMATIC PAYMENTS

- ❒ Utilities (power, gas, water)
- ❒ Property taxes
- ❒ Phone, internet, streaming services
- ❒ Mortgage, loan, and line of credit payments
- ❒ Insurance payments
- ❒ Credit card payments
- ❒ Investment contributions
- ❒ Memberships and subscriptions
- ❒ Other automatic withdrawals
- ❒ Update your Interac e-Transfer email settings

4 EXPLORE OTHER WCU SERVICES

- ❒ Lending
- ❒ Credit Cards
- ❒ Investments
- ❒ Wealth Management
- ❒ Insurance
- ❒ Business Banking

5 COMPLETE THE SWITCH

- ❒ Keep your old account open for 60-90 days
- ❒ Confirm all deposits and payments have been updated
- ❒ Transfer remaining funds and close your previous account once everything is switched successfully