



## Checklist

### After you have opened your Cornerstone account:

- Discontinue using your old account, and let all outstanding checks clear. (Be sure to leave enough funds to cover any automatic payments that may yet need to be withdrawn.)
- Transfer all direct deposits and notify anyone who makes automatic withdrawals from your account such as: mortgage company, homeowners insurance, auto insurance, gym membership dues, life insurance, utility payments, maintenance payments, etc.
- Turn in your ATM/debit card, unused checks and deposit slips from your former account to us and we will be glad to shred them for you.
- Let us enroll you in Cornerstone's Online Banking/Bill Pay. It's easy, fast, convenient, secure, and there's no monthly fee!
- Apply for a Visa credit card that offers competitive rates, great benefits and no annual fee.

### 4 Weeks after you open your account:

- Verify that all institutions making direct deposits now have your Cornerstone account information and that your deposits will be made to your new Cornerstone account.
- Verify that all companies you pay automatically through your new account now have your new Cornerstone account information and that your payments are being made through your new Cornerstone account or Visa Check Card.

### 8 Weeks after you open your account:

- Check with your former bank to make sure no more deposits, checks, or debit card transactions are being made with your former checking account.
- Mail the attached letter to close your former checking account.