



ELIMINATE *the HASSLE* of switching

SWITCHKIT, POWERED BY CLICKSWITCH IS CONVENIENT, FAST, AND SECURE

3Rivers makes it easy to securely move direct deposits and recurring automatic payments (like utilities, insurance, or club memberships) to your 3Rivers account(s). Just use our digital SWITCHkit, powered by ClickSWITCH.

How SWITCHkit Works

1. Obtain a SWITCHtrack code (contact us at any branch or call 800.825.3641 if you need one). If you have one, get started at 3riversfcu.org/switchkit.
2. Use your code to securely switch direct deposits or automatic payments and close old accounts.
3. SWITCHkit generates and sends completed forms to your old financial institutions and/or billers on your behalf.

All in About 10 Minutes

1. **Enroll** — Just enter some basic info, create an e-signature, and you're ready to switch!
2. **Start with direct deposits** — We may already have your employer's direct deposit form in our database. If not, an agreement will be generated with your info and sent onto your employer for processing.
3. **Next, switch automatic payments** — Enter the biller name and click "create." Then select your account. Everything else automatically populates for you.
4. **Finally, close your old accounts.** Just enter the name and address of your old financial institution along with some account info.
 - *It is recommended that you keep your old account open for 30 days to allow enough time for the switches to be complete and for checks/automated payments to clear.*

Help and Guidance While Switching

- **Switch Summary** — View progress and details of requested switches.
- **Switch Status** — Track and view confirmation when your automatic payments or direct deposits have been switched to your 3Rivers accounts.
- **Balance Assist** — Know approximately how much money you should keep in your old account(s) until your switch(es) to 3Rivers complete.



Federally insured by the NCUA.

3riversfcu.org

800.825.3641