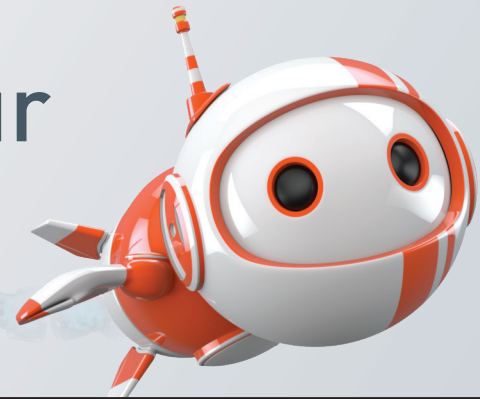


Road to Switching Your Account to Logix



Spending a little time to move your account to Logix can easily save you hundreds of dollars each year. Let us help you make the switch to smarter banking. Below you'll find a step-by-step action plan, along with a checklist to make the process go smoothly.

STEP ONE	<p>Open a checking with Logix – DONE!</p> <ul style="list-style-type: none"> ■ Use the following steps to switch all direct deposits, automatic payments and online bill payments
STEP TWO	<p>Leave your old account open until all services switch to your Logix account</p> <ul style="list-style-type: none"> ■ Why? It can take from 30-60 days for other entities to switch direct deposits/automatic payments to your new account ■ Leave a balance in the old account to cover automatic payments you anticipate during the transfer period
STEP THREE	<p>List all direct deposits and automatic payments to be switched to your Logix account</p> <ul style="list-style-type: none"> ■ Use the checklist on the back to gather information on all the services you are switching to your Logix account; and keep track of the progress
STEP FOUR	<p>Transfer Direct Deposits to your Logix account</p> <ul style="list-style-type: none"> ■ Contact your payroll company, pension administrator, social security administration, etc. to see what is required to transfer your direct deposit ■ Ask for the date by which the switch will be made
STEP FIVE	<p>Transfer Automatic Payments to your Logix account</p> <ul style="list-style-type: none"> ■ Contact each company to see what is required to transfer your automatic payments; many times you can complete it online or by phone ■ If you use online bill payment where you individually authorize payment each month through e-statements, cancel this service and all payments at your old account and establish it with Web BillPay through Logix ■ Consider using your Logix credit or debit card for your recurring payments
STEP SIX	<p>Track Progress</p> <ul style="list-style-type: none"> ■ Use online banking at Logix (www.lfcu.com) and your old account to keep track of progress on switching of individual services including direct deposits and automatic payments ■ Check off progress on your checklist ■ Reviewing the status once or twice a week can help you spot any potential problems
STEP SEVEN	<p>Close your old account</p> <ul style="list-style-type: none"> ■ Contact your previous financial institution to see what is required to close your account; most likely they will require something in writing, but they might take your request over the phone ■ Close the old account only after all outstanding items have cleared and the switch is complete for all direct deposits, automatic payments and other services such as online bill pay

INFORMATION AND TRACKING CHECKLIST

Logix Routing Number: 322274187

Logix Account Number: _____

Previous Institution Account Number: _____

DIRECT DEPOSIT

Deposit	Date Notification Complete	Complete
Employer (payroll)		
Government		
Social Security Administration – www.socialsecurity.gov or call 800-772-1213		
Brokerage/Investment Account		
Child Support or court-ordered deposits		

AUTOMATIC PAYMENTS (continued)

Payment	Account Number and/or other important information (phone number)	Date Changed Online or Mailed Request	Complete
Membership/ Club Dues			

AUTOMATIC PAYMENTS

Payment	Account Number and/or other important information (phone number)	Date Changed Online or Mailed Request	Complete
Gas			
Electric			
Telephone			
Cell Phone			
Internet			
Cable/Satellite			
Water			
Garbage			
Newspaper			
Insurance			
Mortgage/Rent			
Home Equity Loan			
Association Fees			
Credit Card			

ACCOUNTS TO CLOSE

Financial Institution and any other important information	Request Submitted	Date of Closure

Remember to destroy your old:

- Checks
- ATM/Debit cards
- Deposit Slips