

Get Started Using ClickSWITCH

Simply Follow These Steps to Start the Secure Process

1. To get started log in to your online banking.
2. Select Payments and then ClickSWITCH from the left hand menu.
3. Select which direct deposits and automatic payments you'd like to switch and begin the switching process.

Automated Payments Checklist

An automatic payment is a regular, ongoing payment that is initiated from your financial institution account, such as a monthly insurance bill, utility payment or automobile loan payment. Use the checklist below to organize the transfer of your automatic payments to your new credit union account. Take into consideration any annual payments that you may have set up as a deduction.

- | | |
|--|--|
| <input type="checkbox"/> Electric | <input type="checkbox"/> Mortgage/Rent Payment |
| <input type="checkbox"/> Gas | <input type="checkbox"/> Automobile Loan/Lease |
| <input type="checkbox"/> Water | <input type="checkbox"/> Department Store Card |
| <input type="checkbox"/> Telephone | <input type="checkbox"/> Home/Rental Insurance |
| <input type="checkbox"/> Mobile Phone | <input type="checkbox"/> Automobile Insurance |
| <input type="checkbox"/> Cable Service | <input type="checkbox"/> Life/Health Insurance |
| <input type="checkbox"/> Auto Club (CAA) | <input type="checkbox"/> Charitable Donations |
| <input type="checkbox"/> Health Club | <input type="checkbox"/> Other Loans _____ |
| <input type="checkbox"/> Credit Card | <input type="checkbox"/> Other _____ |

Direct Deposit Checklist

A direct deposit is any payment that you receive from a person or organization directly into your account. These include payroll direct deposits, government direct deposits (CPP, Disability, etc.) and dividend direct deposits from investment accounts. Use the checklist below to organize the transfer direct deposits to your new account.

- | | |
|---|---|
| <input type="checkbox"/> Employee Payroll | <input type="checkbox"/> GST/HST Credit |
| <input type="checkbox"/> Investment Income | <input type="checkbox"/> CPP _____ |
| <input type="checkbox"/> Retirement/Pension | <input type="checkbox"/> Other _____ |

ADDITIONAL CAPABILITIES

Easy Set-up

Account data will be automatically populated into the ClickSWITCH portal. Just click on which billers you'd like to switch and ClickSWITCH takes care of the rest, sending completed account switch forms and a copy of a voided cheque directly to billers.

Switch Status

Enables you to easily track payments you want to transition to a new account.

Switch Summary

The ClickSWITCH portal allows you to view a listing of all switches currently in progress and details regarding each switch. The Switch Summary will also let you know if additional action is needed from you and confirm when a switch has been successful.

Account Closure

Easily initiate closure for previous financial institution accounts once the switch process is complete.

Learn About ClickSWITCH

Finally, there's a simple way to switch.

Now you can easily move automatic payments and direct deposits to your Credit Union account, all with the click of a mouse. No complicated switch kits or wasting time contacting companies, just an easy process that does the work for you. With ClickSWITCH, account information is transferred quickly; it's automated, convenient and takes as little as 10 minutes.