



## Learn About ClickSWITCH®

ClickSWITCH is a secure and convenient method to help you transfer your direct deposits and recurring payments from another financial institution to your Northwest Federal checking account.

In less than 10 minutes and just a few clicks, you can safely and efficiently:

- Set up Direct Deposit
- Set up Bill Pay
- Watch payment tracking to new accounts
- Start account closure processing with the other financial institutions

ClickSWITCH will do the rest for you with this fully automated service.

## The Simple Way to Switch!



### Member Service Center

#### Hours

Mon-Fri: 7 am-7 pm ET  
Sat: 8 am-1 pm ET

#### Phone

703-709-8900  
844-709-8900 (toll-free)

#### Fax

703-925-5113

#### TTY

703-709-8919

### Web Services

#### Website

[nwfcu.org](http://nwfcu.org)

#### Email

[nwfcu@nwfcu.org](mailto:nwfcu@nwfcu.org)

### ABA Routing Number

**256075025**

Direct deposit, inbound wire transfers, ACH transactions



Chantilly | Gainesville | Herndon | Leesburg  
Manassas | Rockville | Vienna



Insured by NCUA  
All information is current as of 1/2019  
and is subject to change.

WC (1/2019) 5M



# ClickSWITCH®

Switch to a checking account with better benefits in just a few clicks!



Together, we serve and inspire to transform lives.

# Switch Your Checking to Northwest Federal in Just a Few Clicks

Northwest Federal Credit Union offers a fast, convenient and safe way to switch your direct deposits and automatic payments from another financial institution to your checking account with us. You can also quickly and easily set up your bill payments.

## Get Started Today Using ClickSWITCH®

Call us or stop by a branch to request your Switch Track Code: \_\_\_\_\_.

Then follow these simple steps to make the switch:

1. Log in to ClickSWITCH at [nwfcu.org/switch](http://nwfcu.org/switch).
2. Set up your username and personal password.
3. Gather the information for your existing automated payments and direct deposits to be switched to your new account.
4. Click "Create a Deposit" and begin adding your direct deposit information.
5. Click "Create a Switch" to begin adding your payment accounts.
6. Submit each switch, close old accounts and receive real-time switch confirmation. We'll take care of the rest.



## More Great Benefits

### Easy Setup

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 directly to billers.

### Switch Status

Switch Status enables you to easily track the payments you'll need to transition to a new account.

### Switch Summary

The ClickSWITCH portal allows you to view a listing of all switches currently in progress as well as 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.

### Balance Assist

Balance Assist helps to take the guess work out of figuring out how much money you should keep in your old account(s) until the switch is complete. With Balance Assist you will be advised approximately how much money is recommended to leave within your existing account(s) in the case that your automated payments get pulled prior to your account switch.

### Account Closure

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

## Automated Payments Checklist

An automated payment (or ACH) is a regular, ongoing payment that is initiated externally to your bank account, such as a monthly insurance bill, utility payment or automobile loan payment. Use the checklist below to organize the transfer of your payments. Have your account number, billing address and billing phone number available to complete the switch. Take into consideration any annual payments that you may have set up as a deduction, as well.

- |   |  |
|---|--|
| <input type="checkbox"/> Electric           | <input type="checkbox"/> Mortgage/rent         |
| <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/satellite TV | <input type="checkbox"/> Life/health insurance |
| <input type="checkbox"/> Automobile club    | <input type="checkbox"/> Charitable donations  |
| <input type="checkbox"/> Health club        | <input type="checkbox"/> Other _____           |
| <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 (Social Security, 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"/> Investment income  |
| <input type="checkbox"/> Retirement/pension |
| <input type="checkbox"/> Social Security    |
| <input type="checkbox"/> Other _____        |
| <input type="checkbox"/> Other _____        |

