Make Nusenda Your Primary Financial Partner

YOUR NEW MEMBERSHIP CHECKLIST

Welcome to The Power of WE®. Thank you for choosing Nusenda Credit Union. Whether you've recently joined us by opening a new account or through an auto loan, we're excited to help you make the most of your membership. Many members begin their relationship with a single account or loan. By bringing together your checking account, direct deposit, digital banking, savings, and lending needs, you can simplify your financial life and experience even more of the benefits available through Nusenda membership.

You've already taken the first step by becoming a Nusenda member. This guide will help you move your everyday banking activities to Nusenda and make the most of your membership.

Why Make Nusenda Your Primary Financial Partner?

One of the advantages of credit union membership is access to programs designed to help members save money and achieve their financial goals.

Featured Benefits

- **EARN YOUR RETURN®** - earn a bonus dividend by actively participating in Nusenda
- **COMMUNITY REWARDS®** - use your debit card and earn cash for you and your community
- **THE POWER OF CHANGE®** - round up your purchases to save, pay down debt or donate
- **CREDIT SCORE** – check your credit score as often as you would like with digital banking
- **FINANCIAL EDUCATION RESOURCES** – tools to help no matter where you are in your financial journey

Important Reminder

- **Keep your previous account open until all direct deposits and recurring payments have successfully transferred to your Nusenda account.**
- **Consider leaving enough money in the account to cover pending transactions during the transition.**

NUSENDA® CREDIT UNION

STEP 1 Enroll in Mobile and Internet Banking

Get started by enrolling in Nusenda Mobile and Internet Banking. This gives you convenient access to your accounts and the tools you'll need to manage your everyday banking with Nusenda. **Learn more at nusenda.org/mobile.**

STEP 2 Move Your Direct Deposits

Contact the organizations responsible for your income deposits and update your account information. Some employers and benefit providers may require a direct deposit form.

Examples include:

- Employer payroll
- Social Security benefits
- Retirement or pension deposits
- Military or veteran benefits
- Other recurring deposits

WHY IT MATTERS: Having your income deposited directly into your Nusenda account gives you convenient access to your money and makes it easier to manage more of your everyday banking with Nusenda.

STEP 3 Update Your Recurring Payments

Review your current account activity and update recurring payments to your Nusenda account.

Examples include:

- Mortgage or rent
- Utilities
- Internet and mobile phone
- Insurance
- Credit cards
- Loan payments
- Memberships and subscriptions

STEP 4 Connect Your Digital Financial Life

Don't forget the apps and services you use every day.

Examples include:

- PayPal
- Venmo
- Cash App
- Apple Pay
- Google Pay
- Amazon
- Investment accounts
- Other payment apps

WHY IT MATTERS: Keeping your favorite services connected to Nusenda helps create a seamless banking experience.

STEP 5 Complete Your Switch

Monitor both accounts during the transition. Verify that direct deposits, recurring payments, and digital payment services have successfully transferred before closing your previous account.

Before closing your previous account:

- Confirm all direct deposits are going to Nusenda.
- Confirm all recurring payments are being withdrawn from your Nusenda account.
- Confirm digital payment services are connected to the correct account.
- Transfer any remaining funds.
- Close previous account(s) when the transition is complete.

WE'RE HERE TO HELP

Your Nusenda Member Outreach Representative can help you:

- Set up direct deposit
- Update recurring payments
- Open a checking account
- Explore member benefits
- Enroll in Mobile and Internet Banking
- Identify solutions aligned to your financial goals

Call **505-889-7755** or **800-347-2838** outside the Albuquerque area or visit **nusenda.org.**

INFORMATION YOU'LL NEED

Nusenda Routing Number	**307083665**	**Nusenda Account Number**	
Previous Institution Routing Number		**Previous Institution Account Number:**	

DIRECT DEPOSIT TRACKER

Deposit Source	Change Requested	Confirmed
Employer Payroll	❑	❑
Social Security Benefits	❑	❑
Retirement/ Pension	❑	❑
Military/Veteran Benefits	❑	❑
Investment Account	❑	❑
Other	❑	❑

Notes:

DIGITAL PAYMENT TRACKER

Don't forget *apps and services that may be connected to your debit card or account information.*

Service/App	Updated	Confirmed
PayPal	❑	❑
Venmo	❑	❑
Cash App	❑	❑
Apple Pay	❑	❑
Google Pay	❑	❑
Amazon	❑	❑
Other	❑	❑

RECURRING PAYMENT TRACKER

Payment	Change Requested	Confirmed
Utilities	❑	❑
Insurance	❑	❑
	❑	❑
	❑	❑
	❑	❑
	❑	❑
	❑	❑
	❑	❑
	❑	❑
	❑	❑

Helpful Reminder: Consider loans, subscriptions, memberships, and other recurring payments.

ACCOUNTS TO CLOSE

Financial Institution	Closure Requested	Closed
	❑	❑
	❑	❑
	❑	❑

FINAL CHECKLIST

- ❑ Enroll in Mobile and Internet Banking at nusenda.org/mobile
- ❑ All direct deposits transferred
- ❑ All recurring payments transferred
- ❑ Digital payment services updated
- ❑ Remaining balance transferred
- ❑ Previous account(s) closed
- ❑ Old checks destroyed
- ❑ Old debit cards destroyed
- ❑ Old deposit slips destroyed

We are here to help. If you need assistance, call us at **505-889-7755** (800-347-2838 outside the Albuquerque area or visit us at **nusenda.org**.

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