






-  12611 Fuqua St. Houston, TX 77034
-  713.852.6700
-  TexasBayCU.org

Checking Account Switch Kit



#1 ★★★★★
Credit Union in Houston

6 Easy Steps to a Texas Bay Checking Account!



Open Texas Bay Checking Account

- Perks Checking, Premium Perks Checking, or Simply Checking? [CLICK HERE](#) to compare.
- Visit one of our [9 branch locations](#) or [open your account online now](#).



Stop Using Your Old Account

- Destroy unused checks, deposit slips, and ATM/Debit cards
- Keep open for 30 days to ensure all outstanding debits have been processed



Change Direct Deposits

- Use our [Direct Deposit Form](#) to change any payroll or other automatic deposits to your new checking account
- If receiving deposits from Social Security <https://godirect.gov/gpw/>
- If receiving deposits from a retirement fund, contact that organization for instructions



Change Automatic Payments

- Use the Automatic Payment Checklist (page 3 in this document) to identify and make the change
- Use the Automatic Payment Change form provided in this document to change automatic payments that cannot be changed online or by phone
- Check the past three months' statements for recurring charges to ensure all are caught



Sign Up for Digital Banking

- Instructions for setting up your Texas Bay Digital Banking account can be found on page 5.
- Once your online account is created make paying your bills easier by setting up automatic payments through our easy-to-use Bill Pay platform.



Close Your Old Checking

- Contact your previous financial institution to close your old checking account. This can be done either in person or by using the Account Closure Request form included in this document.



Automatic Payment Checklist

- Mortgage / Rent
- Cell Phone
- Electricity
- Water
- Sewer / Trash Collection
- Internet
- Cable
- Subscriptions (Netflix, Hulu, etc.)
- Credit Cards
- Home / Auto / Life Insurance
- Loans
- Investments
- Health Clubs
- Charities

Other:

- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____
- _____

To change your automatic payments to draft from your new Texas Bay checking account, each of these companies will need to be contacted individually. These companies may ask for a voided check from your new account, your account number, our routing number (313082935), and other information to verify you have proper access to this account.

If you need any assistance locating your account information, a Texas Bay Credit Union team member will be happy to assist you with this.





Automatic Payment Change Form

Complete and sign this form and send it to each merchant/payee you currently have withdrawals or payments automatically withdrawn from your old account.

Merchant/Payee Name: _____

Address: _____

City: _____ ST: _____ Zip: _____

To Whom It May Concern:

Please discontinue making payments from my old account:

Financial Institution: _____

Routing #: _____ Account #: _____

I hereby authorize any future automatic payments to be electronically debited from my new Texas Bay Credit Union account:

Texas Bay Credit Union
12611 Fuqua St.
Houston, TX 77034
713-852-6700

New Account #: _____
Routing #: 313082935
Account Type: Checking Savings

If you have questions about this request, please contact me.

Thank you for your cooperation,

Signature: _____ Date: _____

Name: _____

Address: _____

City: _____ ST: _____ Zip: _____

Phone #: _____

Email: _____





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 TexasBayCU.org

Set Up Your Digital Banking

Login Options:

Website: www.TexasBayCU.org – click on the LOGIN button



OR

App: Download the Texas Bay CU App



WEBSITE: Click Enroll

ACCOUNT ACCESS

SIGN-ON ID

PASSWORD

SIGN IN

Enroll

[Forgot Sign-on ID/Password?](#)

APP: Click Register

8:45 5G

Texas Bay CREDIT UNION

Fast Balances

Password

Save User ID Log in

Forgot password?

Register Face ID Location Call Us

Texas Bay Credit Union | Version 23.1.0 (3)
 Disclaimer | Privacy Policy
 Equal Housing Opportunity | Federally Insured by NCUA



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The below page will appear for you when registering for the first time.
Please make sure to complete all the fields with the asterisk *.

You will need your Share Savings Account Number.

Registration ?

Required fields:
Asterisk denotes required field


***First Name**

*** Last Name**

Email Address

*** Social Security Number**

***Savings Account Number**

***Birth Date**
  (mm/dd/yyyy)

***Mobile Phone**

Driver's License



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Logging in the First Time:

In the form, we ask for your mobile phone number. You will receive a one-time passcode by text. Use this code to log in the first time. You will be able to set your own password upon the first login. Be sure to choose something you will remember!

Set Up Bio-Login!

If your smartphone allows the use of Face ID or your fingerprint to access your phone or other apps, then you can use this with our app, too! To set this up, simply tap on Face ID or the Fingerprint and follow the instructions. You will need to have already set up your User ID and Password.

If you are having trouble logging in please contact us at (713)852-6700.



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Account Closure Request

Old Financial Institution Name: _____

Address: _____

City: _____ ST: _____ Zip: _____

To Whom It May Concern,
Please close my account(s) listed below:

Account #: _____ Account Type: Checking Savings

Account #: _____ Account Type: Checking Savings

Account #: _____ Account Type: Checking Savings

Account #: _____ Account Type: Checking Savings

Forward the funds remaining in my account(s) to:

- Me at the address below
- Texas Bay Credit Union
12611 Fuqua St.
Houston, TX 77034
713-852-6700

New Account #: _____
 Routing #: 313082935
 Account Type: Checking Savings

Name: _____

Address: _____

City: _____ ST: _____ Zip: _____

Phone #: _____

Email: _____

Signature: _____ Date: _____

Joint Owner Name (if applicable): _____

Signature: _____ Date: _____

