



Checklist

Before Merger To Do - By November 24, 2017

- 1. Know your account number and the last four digits of your primary phone number currently on record at FFCU
- 2. Log into Online Banking and select My Settings
 - a. Ensure your Account Profile is current (ie: address, phone number, email address)
- 3. Print a screen shot of your Bill Payment – Payees
- 4. Print a screen shot of your scheduled and recurring transfers from Online Banking
- 5. Download/Print eBills
- 6. Download/Print Statements
- 7. Print Check copies
- 8. Cancel any Bill Pays scheduled for December 1, 2017 and beyond
- 9. Review Debit/Credit Card automatic payments
- 10. Submit Mobile Deposits before November 24, 2017

Checklist

After Merger To Do - December 1, 2017

- 1. Enroll for Tropical Online Banking
 - a. Enroll for eStatements
 - b. Reschedule any recurring and/or schedule transfers
 - c. Input login credentials for account in Finance Works
- 2. Enroll for Bill Pay
 - a. Setup Payees
- 3. Provide new account information to:
 - a. Direct Deposits
 - b. Automated ACH payments
- 4. Download Tropical Financial's Mobile App
- 5. Download the CardValet Mobile App
- 6. Register for Mastercard® ID Theft Protection™

Checklist

For Credit Cards To Do

- 1. Your new TFCU Mastercard® credit card will arrive before January 29, 2018
- 2. ACTIVATE CARD JANUARY 29, 2018
- 3. Discontinue use of FFCU Visa credit card on or before January 29, 2018
- 4. Notify merchants of your new Mastercard information by January 29, 2018

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