



◀ ClickSWITCH ▶

Finally, a simple way to streamline your banking accounts. Now you can easily move your recurring payments and direct deposits to Rapport Credit Union - all with the click of a mouse. With ClickSWITCH, account information is transferred quickly; it's automated, convenient and takes as little as 10 minutes.

What is ClickSWITCH

ClickSWITCH is Rapport Credit Union's online tool to help members move recurring payments at any other financial institution to your Rapport Credit Union account.

- Securely transfer payments such as insurance, utilities, mortgage payments, etc.
- Transfer your pay cheque deposit.
- Transfer payments from the Government such as Pension or GST deposits.
- View automatic payments linked with another financial institution and decide what you would like to switch over to Rapport Credit Union.
- Even initiate the closure of your old account.

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Switching Your Pre-Authorized Debits is Easier Than Ever Before



◀ ClickSWITCH ▶

Switching Your Account is
Just a Click Away!

Get Started Using ClickSWITCH

Simply Follow These Steps to Start the Secure Process

1. To get started call us at 1 888 516 6664 or visit a branch.
2. Enter the SwitchTRACK code provided by us to login.
3. Login at rapportcu.clickswitch.ca
4. Once completed, you are now enrolled and can start a Switch Concierge session.
5. Select which direct deposits and pre-authorized debits you'd like to switch and begin the switching process.



Pre-Authorized Debits Checklist

An automated payment (or ACH) or pre-authorized debit is a regular, ongoing payment that is initiated from 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 pre-authorized debits to your new 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"/> Charitable Donations |
| <input type="checkbox"/> Auto Club (CAA) | <input type="checkbox"/> Other Loans _____ |
| <input type="checkbox"/> Health Club | <input type="checkbox"/> Other _____ |
| <input type="checkbox"/> Credit Card | <input type="checkbox"/> Other _____ |

Direct Deposit Checklist

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

- | | |
|--|---|
| <input type="checkbox"/> Employee Payroll | <input type="checkbox"/> GST/Canada Child Benefit |
| <input type="checkbox"/> Investment Income | <input type="checkbox"/> Old Age Security |
| <input type="checkbox"/> Canada Pension Plan | <input type="checkbox"/> Other _____ |

Additional Features

Switch Assist

Allows you to login to your old financial institution to access your existing account, see recurring payments and switch those accounts over to your Rapport Credit Union account.

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 external accounts once the switch process is complete.