

CHOOSING THE RIGHT FINANCIAL INSTITUTION



This checklist is here to help you make informed decisions by focusing on what truly matters —protecting your hard-earned money, easily accessing your VA benefits, ensuring support during deployments, and taking full advantage of veteran-specific services.

WHAT YOU NEED TO KNOW



Direct Deposit Setup: Ensure your financial institution supports easy setup and management of direct deposits for your VA benefits. This includes reliable and timely processing of your VA compensation, pension, or education benefits directly into your account.



VA Loan Expertise: Ensure the institution offers VA Loans and has knowledgeable staff who understand the unique needs of veterans if you plan on purchasing a home in the future..



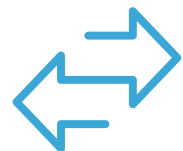
Active Monitoring: Look for institutions that offer real-time fraud alerts and robust account monitoring.



Overseas Support: Verify services are accessible while deployed or stationed OCONUS, including international transaction support and secure online banking.



Financial Education: Access to resources that educate you on budgeting, saving, and investing specifically tailored for military and veterans.



Ease of Transition: If your current institution falls short of your needs, ensure switching is easy, with support for transferring direct deposits, automatic payments, and VA benefits.