

# eswitchkit

## **How to Switch from your current account to a new Credit Union account.**

Everything you need to move your account to your Credit Union is included within this electronic “Switch Kit.” Take your time and check out everything. If you have any questions, please call a Member Services Representative at the credit union. We can help guide you through the process of becoming a member of our Credit Union.

### **Step One: Open your new account**

To become a member of a Credit Union, you must have a Share Account. We also offer other financial products and services such as Checking accounts, ATM Cards, Debit Cards and more. Visit our website for more information on our wide selection of financial solutions.

### **Step Two: Transfer automatic payments and deposits**

Once your new Credit Union account is opened, you’ll need to notify companies and financial institutions that make automatic withdrawals from your old account. These may include your cell phone bill, Xbox Live membership, Netflix, car insurance and anyone else that you pay through automatic transfers. You also will need to notify any company that makes automatic deposits into your account, such as Direct Deposit through your employer.

We’ve included a form to use to notify all parties of the switch. Check with the involved parties to make sure they will accept this form — some parties may require you to fill out a form of their own.

### **Step Three: Close your old account**

Now that your automatic payments and deposits are transferred, you can close your old account. Be sure to leave your accounts open long enough for outstanding checks and withdrawals to clear. This may take several weeks. Included in this Switch Kit is a form to help you close your old account.

### **Step Four: Relax**

Welcome to the Credit Union! Now that you’re a part of the Credit Union family, be sure to stop by our branch and say hello!

# Close Your Account

**Close Your Account Instructions:** Use this form to close your account at your existing financial institution and have your funds transferred to the Credit Union. Before you send this form to us, be sure all of your outstanding checks and automatic withdrawals have paid from the account you are closing. The Credit Union will not be responsible for returned checks or additional penalties for closing your account.

## Please close my account

Date: \_\_\_\_\_  
Month, day, year

To: \_\_\_\_\_  
Bank name

From: \_\_\_\_\_  
Your name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

## To Whom It May Concern:

Please close my account # \_\_\_\_\_  
Account Number

Please send a check for the remaining balance made payable to me at the address listed below. All of my outstanding checks and automatic withdrawals have been paid from this account.

Please deposit into the following Credit Union account:

- Share Account                       Checking Account

If you have any questions about this request, please contact me at the following number:

Phone: \_\_\_\_\_ day/evening (circle one)

**Sincerely,**

**X** \_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

**X** \_\_\_\_\_  
Co-signer Signature (if applicable)

\_\_\_\_\_  
Co-signer Name (if applicable) (please print)

## Mail check(s) to:

\_\_\_\_\_  
Credit Union name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

# Automatic Payment Change Notification

**Automatic Payment Change Notification Instructions:** Use this form to change your automatic withdrawals from your existing financial institution to the Credit Union. Complete one form for each company or organization that you have set up for automatic payment. Once we receive the completed form, we will submit it to each company you specify.

Date: \_\_\_\_\_  
Month, day, year

To: \_\_\_\_\_  
Name of company that makes automatic withdrawal

\_\_\_\_\_  
Company address

\_\_\_\_\_  
City, State, Zip

## To Whom It May Concern:

You currently withdraw \$ \_\_\_\_\_ for my \_\_\_\_\_.  
(amount) (i.e. health club dues)

Account Number: \_\_\_\_\_

**Effective immediately, please redirect my automatic payment for the above account number to my new account indicated below:**

Credit Union Name: \_\_\_\_\_

Credit Union Routing Number: \_\_\_\_\_

Credit Union Account Number: \_\_\_\_\_

If you have any questions about this request, please contact me at the following number:

Phone: \_\_\_\_\_ day/evening (circle one)

**Sincerely,**

**X**  
\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

# Payroll Direct Deposit

**Payroll Direct Deposit Instructions:** Use this form to set up your Direct Deposit into your Credit Union account. Submit the completed form to your employer.

Date: \_\_\_\_\_  
Month, day, year

To: \_\_\_\_\_  
Your company's name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

From: \_\_\_\_\_  
Your name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

## To Whom It May Concern:

I wish to deposit (select one)

My entire paycheck

A portion of my paycheck \$ \_\_\_\_\_  
(amount)

## Effective immediately, please direct my direct deposit to my account indicated below:

Credit Union Name: \_\_\_\_\_

Credit Union Routing Number: \_\_\_\_\_

Credit Union Account Number: \_\_\_\_\_

If you have any questions about this request, please contact me at the following number:

Phone: \_\_\_\_\_ day/evening (circle one)

**Sincerely,**

**X**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Other pertinent employer information (i.e. employee ID#, etc.)

# Change Payroll Direct Deposit

**Change Payroll Direct Deposit Instructions:** Use this form to change your Direct Deposit from your existing financial institution to the Credit Union. We will submit the completed form to your employer.

Date: \_\_\_\_\_  
Month, day, year

To: \_\_\_\_\_  
Your company's name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

From: \_\_\_\_\_  
Your name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

## To Whom It May Concern:

You currently deposit (select one)

- My entire paycheck  
 A portion of my paycheck

**Effective immediately, please redirect my direct deposit for the above account number to my new account indicated below:**

Credit Union Name: \_\_\_\_\_

Credit Union Routing Number: \_\_\_\_\_

Credit Union Account Number: \_\_\_\_\_

If you have any questions about this request, please contact me at the following number:

Phone: \_\_\_\_\_ day/evening (circle one)

**Sincerely,**

**X** \_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Other pertinent employer information (i.e. employee ID#, etc.)