



## 5-Step Account Switch Kit

Thank you for choosing the Eaton Family Credit Union checking account.

Here are 5-Steps to help you close your old checking account and easily switch to your new credit union checking account.

### Step 1 – Get Organized

- Gather all pertinent information about your existing account.
- Review your last few statements and note all automatic payments. (Remember to leave sufficient funds to cover any outstanding checks or pending automatic payments.)

*Note: Keep in mind that not all automatic payments that you have previously established occur on a monthly basis. For example, insurance payments, automobile association dues and federal and state tax returns/ payments can occur on irregular intervals such as bi-monthly, quarterly or even an annual basis.*

### Step 2 – Move Your Direct Deposit & Automatic Payments

- Prepare to move your direct deposit by completing the **Direct Deposit Transfer Letter**. Note: you may be asked to fill out an additional form by the party making the direct deposit.
- To transfer social security direct deposit, you can either call Social Security Administration at 1-800-772-1213 or go to [www.ssa.gov/deposit/howtosign.htm](http://www.ssa.gov/deposit/howtosign.htm)
- Set up new automatic payments. You can use our **Automatic Payment Transfer Letter**, or consider our FREE Home Banking and FREE Webster Bill Pay give you more control over your money. (If you're setting up more than one automatic payment, print or make additional copies of the **Automatic Payment Transfer Letter** for each automatic payment.)

### Step 3 – Close Your Old Accounts

- Confirm all checks have cleared and all automatic payments have been made.
- Complete the **Account Closure Request Letter** and send it to your old financial institution. (Remember that some financial institutions may require you to fill out additional forms.) If your account is an interest-bearing account, please consider your account closing date carefully.
- Destroy any unused checks, ATM/debit and credit cards, and deposit slips associated with your old accounts.
- Start using your new Eaton Family Credit Union account exclusively.

### Step 4 – Keep Copies For Your Records

- Remember to keep a copy of all documents, letters and forms for your personal records.

### Step 5 – Transfer Other Accounts

- Consider making your financial life less complicated by transferring other accounts to Eaton Family Credit Union. Transfer your credit card balances to the Eaton Family Credit Union NO ANNUAL FEE Visa. With all of your funds in one place, your life will be easier. We can help you manage your finances and find ways to make your money work smarter for you.



## Direct Deposit Transfer Letter

Complete and sign this form for every party (i.e. employer, vendor) initializing a direct deposit to your account. Then, give this signed form, along with a voided check from your new EATON FAMILY CREDIT UNION account, to the party making the direct deposit.

Establish Direct Deposit

Change my existing Direct Deposit

### Company Information

Name \_\_\_\_\_

Address \_\_\_\_\_

City / State / Zip \_\_\_\_\_ Phone \_\_\_\_\_

### Member Information

Name \_\_\_\_\_

ID# or Account# \_\_\_\_\_

Social Security Number \_\_\_\_\_

Address \_\_\_\_\_

City / State / Zip \_\_\_\_\_ Phone \_\_\_\_\_

### Credit Union Information

Eaton Family Credit Union Routing Number: 241075470

### Deposit Information - Note: You can route your direct deposit to more than one Eaton Family CU account

Eaton Family Credit Union Checking Account Number \_\_\_\_\_

Eaton Family Credit Union Share Saving Account Number \_\_\_\_\_

Amount \$ \_\_\_\_\_ Amount % \_\_\_\_\_

Eaton Family Credit Union Checking Account Number \_\_\_\_\_

Eaton Family Credit Union Share Saving Account Number \_\_\_\_\_

Amount \$ \_\_\_\_\_ Amount % \_\_\_\_\_

I authorize \_\_\_\_\_ (employer/company) to make deposits directly to my Eaton Family Credit Union account(s) indicated above, and authorize the Credit Union to accept such deposits.

Customer Signature \_\_\_\_\_ Date \_\_\_\_\_

## Automatic Payment Transfer Letter

Complete and sign this form for every party (i.e. employer, vendor) initializing an automatic payment transfer from your account. Then, give this signed form, along with a voided check from your new EATON FAMILY CREDIT UNION account, to the party making the direct deposit.

Date

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Name of Institution

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Address

---

City / State / Zip

Phone

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To Whom It May Concern

I would like to change my payment instructions. Currently, you are debiting payment from my old financial institution account at:

Former Financial Institution

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Name

---

Routing Number

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Account Number

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As of \_\_\_\_\_ (date), please stop debiting this account and start debiting this payment from my new account at Eaton Family Credit Union. My new information is as follows:

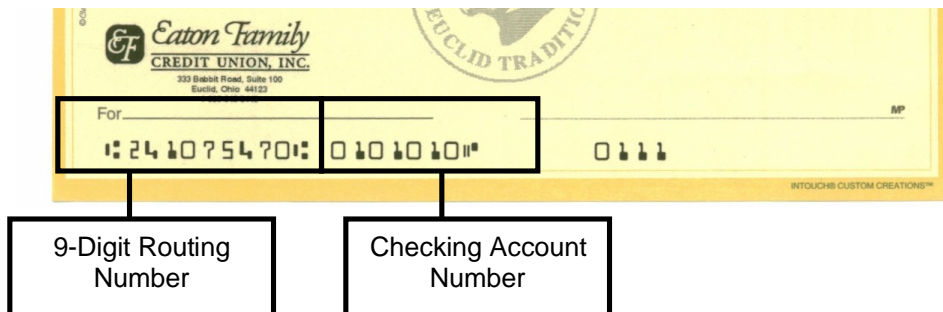
New Financial Institution

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Eaton Family Credit Union Routing Number: 241075470

Account Number

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Please send me a written confirmation of the date this change will be effective on our systems.

Member Signature

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Print Name

---

Account Number with Payee

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Address

---

City / State / Zip

Phone

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## Account Closure Request Letter

Date

Name of Financial Institution

Address

City / State / Zip

Phone

### To Whom It May Concern

This letter is to inform you that I have decided to close the account(s) listed below as of \_\_\_\_\_ (date).

Please close the account(s) noted below and mail the balance and any interest earned to my address.

Please close the account(s) noted below and wire the balance and any interest earned to my new Eaton Family Credit Union account, also noted below.

Account 1

Old Account Number

Old Routing Number

To Eaton Family Credit Union

New Account Number

New Routing Number: 241075470

Account 2

Old Account Number

Old Routing Number

To Eaton Family Credit Union

New Account Number

New Routing Number: 241075470

Account 3

Old Account Number

Old Routing Number

To Eaton Family Credit Union

New Account Number

New Routing Number: 241075470

Upon closure of the account(s), please send a confirmation to the address below.

Sincerely,

Member Signature

Print Name

Account Number with Payee

Address

City / State / Zip

Phone