

Make the switch to better banking today!

Make the move to Service 1 Federal Credit Union in a few simple steps. Use this handy "switch kit" to gather all of the information you need to get started. We can't wait to welcome you to the Service 1 FCU family!

1

Open your new account.

Open your Service 1 FCU account for a truly better banking experience; start with the information-gathering tools on the page that follow!

2

Switch your direct deposits and automatic withdrawals.

Use the handy forms in this kit to gather all of the information you'll need to move your automatic transactions to your new Service 1 FCU account.

3

Close your current account.

Now that you're ready to make the move to Service 1 Federal Credit Union, simply complete the provided form to close your account(s) with your current institution. Any remaining account balance(s) can be transferred to your Service 1 Federal Credit Union account(s); work with your current institution to transfer your funds.

Direct Deposit Authorization

For your convenience, fill out the information on this form to gather everything you'll need to move your Direct Deposit to your new Service 1 FCU account. Complete it either online (then download and print) or manually, and bring it to your current institution to get started.

Use this form to authorize your retirement and pension funds – or any other agency – to deposit your payment directly into your Service 1 Federal Credit Union account. Use one form for each direct deposit.

Notification of Direct Deposit Authorization Change

Company or Employer:

Address:

City, State, ZIP:

Phone Number:

Employee ID:
(if applicable)

Effective immediately, please deposit the net amount of my check to my Service 1 Federal Credit Union account. I authorize (name of depositor) to automatically deposit funds into the account below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.

Place an X next to your desired option.

Net amount to Service 1 Federal Credit Union
Account # Routing # **272483264**

Net amount to Service 1 Federal Credit Union
Account # Routing # **272483264**

Signature: Date:

Name:

Address:

City, State, ZIP:

Phone Number:

Direct Deposit Checklist:

Use this list to remember all direct deposits you need to transfer. These are the most common direct deposits:

- Payroll
- Investments
- Retirement Plans
- Social Security

Automatic Withdrawal Authorization

For your convenience, fill out the information on this form to gather everything you'll need to move your automatic withdrawals (ACHs) to your new Service 1 FCU account. Complete it either online (then download and print) or manually, and bring it to your current institution to get started.

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal. Looking for a quicker, easier way? Many companies and agencies make it simple to change your account of record online via their website.

Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, ZIP:

Phone Number:

Please cancel all automatic withdrawals from **my previous institution**:

Financial Institution:

Account # Bank Routing #

Please make all future automatic withdrawals from **my new institution**:

Financial Institution: **Service 1 Federal Credit Union**

Account # Bank Routing # **272483264**

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature: Date:

Name:

Address:

City, State, ZIP:

Phone Number:

Automatic Withdrawal Checklist:

Use this list to remember all automatic payments you need to transfer. These are some of the most commonly used automatic payments:

- Home Mortgage
- Auto Loans
- Utilities
- Insurance
- Cable/Internet
- Gym/Club Memberships
- Credit Cards
- Investments
- Subscriptions
- Charity Donations

Account Closure Authorization

Use this form to gather everything you'll need to close your current account, then have your funds moved to your new Service 1 FCU account. Complete it either online (then download and print) or manually, and bring it to your current institution to get started.

Upon closing your account at your former financial institution, be sure to verify that any outstanding transactions have cleared. Request that your remaining balance be automatically deposited to your new Service 1 FCU account OR paid to you by check.

Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution:

Address:

City, State, ZIP:

Please close my account:

Account Number: Primary Owner:

Address:

City, State, ZIP:

Please send the remaining balance to:

Place an X next to your desired option.

Please deposit directly to my new account at Service 1 Federal Credit Union:
Account # Routing #

Please forward a check to my address listed below:

Primary Signature: Date:

Joint Signature:

Name:

Address:

City, State, ZIP:

Phone Number:

Congratulations!

Now that you've gathered all of the necessary information, you're ready to switch to a truly better banking experience. We look forward to showing you the local difference and personal touch.

Welcome to Service 1 Federal Credit Union!