

AllCom Credit Union's 5-Step Switch Kit

The following forms have been created for you to help make the process of switching your account(s) easier.

**Important: Make sure to keep this sensitive account information secure and, if printed, consider shredding upon completion. Additionally, exercise caution if transmitting documentation via email as it may not be a secure form of communication.*

1 Open your new AllCom Credit Union account

Visit convenient branch location and a dedicated Member Service Specialist will happily assist you in establishing your new account with us.

2 Get organized

Use our hassle-free switch kit to organize the transactions that will be switched to your new AllCom Credit Union account.

3 Transfer your direct deposits

Send **Form 1: Direct Deposit Authorization Form** to your employer and other sources so your funds can be automatically deposited to your account. If you have direct deposits going elsewhere, you can also use this form to switch them to your new account.

4 Move your automatic payments

Send **Form 2: Automatic Payment Authorization Form** to each of your creditors to switch any automatic payments so they'll come out of your new AllCom Credit Union account.

5 Say "goodbye" to your old account

Use **Form 3: Account Closing Letter** to notify your previous financial institution to close your account and let them know how to disburse any of your remaining funds. Make sure all of your checks and debits have cleared BEFORE you close your old account.

Please note: AllCom Credit Union cannot guarantee that these forms will be accepted in every instance. Your previous financial institution and/or your service partners may require you to make any of these requests in person or another method than mail. They may also require more or different information than is contained on the forms provided.

If you have any questions or concerns during this process, please do not hesitate to contact us at 508-754-9980.



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Transaction Checklist

Get Organized

**Helpful Tip: For reference, gather your most recent statement from your old financial institution. You may even want a couple months worth. If applicable, include statements/information for utility payments, loan payments, health club memberships, etc. you have set up with your old account.*

Direct Deposits: List all direct deposits to your account(s).

Deposit Type	Company/Institution	Account Number	Amount	Date
Employer Payroll				
Social Security				
Pension/Retirement				

Automatic Payments/Transfers: List all withdrawals from your account(s).

Withdrawal Type	Company/Institution	Account Number	Amount	Date
Mortgage/Rent				
Home/Auto Insurance				
Gas/Electric				
Phone				
TV/Internet				
Credit Card				

Former Account Activity Tracking

You will want to keep track of the activity on your old account. Make sure that all checks, deposits, automatic payments, debit card transactions and ATM withdrawals have cleared before closing the account.



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Direct Deposit Authorization

Please complete the following information and fax or mail this form to your employer's Payroll or Human Resources department. Direct deposit of your payroll should begin by the following pay period, though delays may occur.

Name: _____

Account type:

Checking Savings

Routing number: 211387017

Account number: _____

Savings Account Number - Please provide your AllCom base member account number ONLY. Do not write the "00" suffix. For example, Savings Account 12345-00 should be listed as 12345.

Checking Account Number - Please provide the 13 digit account number that begins with "000..." listed on the bottom portion of one of your AllCom checks.

Net deposit (entire check amount)

Fixed amount \$ _____

Signature: _____ Date: _____

If you have allocations setup to transfer out of your payroll (to loan payments, club accounts, etc.), please contact AllCom so we can modify this information. If you would like your payroll split up between multiple accounts, please have your payroll company send it to one account and then we will setup the disbursements between multiple accounts for you. Please call 508-754-9980 with any questions.



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Automatic Payments

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal.

Home Mortgage, Auto Loans, Utilities, Insurance, Cable/Internet, Gym Membership, Credit Cards, Investments, Subscriptions, or Charity Donations.

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 old institution:

Financial Institution: _____

Account Number: _____ Routing Number: _____

Please make all future automatic withdrawals from my new institution:

Financial Institution: AllCom Credit Union

Account Number: _____ Routing Number: 211387017

Signature: _____ Date: _____

Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____



Account Closure Authorization

Use this form to close your account(s) at your former financial institution. Verify all outstanding items have cleared your old account.

Notification of Account Closure Authorization:

Financial Institution: _____

Address: _____

City, State, Zip: _____

Please close my account(s):

Account Number: _____

Primary Owner: _____

Address: _____

City, State, Zip: _____

Please send the remaining balance to:

Please deposit directly to my new AllCom Credit Union account:

Account number: _____ Routing Number: 211387017

Please forward me a check to my address listed below:

Primary Signature: _____ Date: _____

Joint Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

