



# It's easy to make the switch

Now you can switch to a United Financial Credit Union account, quickly and easily! This Switch Kit contains a simple step-by-step outline to help you open your new account, close down your old ones, and begin enjoying all the benefits of United Financial CU.

Just follow the instructions inside and with our five simple steps you will be done in no time! Then you can relax, knowing that your United Financial CU account is ready to go. If you ever have any questions about your account or any of our other services, feel free to contact the Credit Union at 989.777.3620 or visit [www.unitedfinancialcu.org](http://www.unitedfinancialcu.org).

This switch kit is a tool to help you switch your accounts to United Financial. Please check with your previous Financial Institution to see if they will accept these forms to change/cancel your accounts.

## Checklist

Do you have automatic withdrawals from your account for the following expenses? Make as many copies of your "Automatic Withdrawal Change Form" as you need and send one to each company that handles recurring payments automatically.

- Mortgage
- Auto Loan(s)
- Health Insurance
- Life Insurance
- Car Insurance
- Credit Card(s)
- Electric
- Cable TV
- Internet Access
- Health Club Dues
- Telephone
- Investments
- Cell Phone
- Gas Company
- \_\_\_\_\_
- \_\_\_\_\_

## Related Services

- Reward Checking Account**  
Choose from three different reward options on your checking account
- Debit Card**  
Withdraw cash when you need to or pay for your purchases easily
- Virtual Branch Online Banking**  
Complete account access and control 24/7 with a "click"
- E-Statements**  
Save time and receive your statements online
- Net Pay Online Bill Pay**  
Pay your bills online by establishing recurring payments or log in and pay one at a time
- Mobile Banking**  
Access your account at your fingertips
- Consumer Credit Cards**  
Low rates, multiple card options, local services, reward options and much more
- US 24 Telephone Teller**  
Secure account access by phone 24/7



**NCUA** Your savings federally insured to at least \$250,000 and backed by the full faith and credit of the United States Government

National Credit Union Administration, a U.S. Government Agency

# 5 Simple Steps

Follow these 5 steps, and you'll be on your way to a convenient, money-saving account. We have included the forms you need. We'll even help you fill them out if you like! Just stop by United Financial Credit Union for friendly personal assistance.

- 1. OPEN your new United Financial CU account.** Visit us online or stop by one of our branches for a membership application.
- 2. STOP using your old checking account.** You will need to let all your outstanding checks clear before closing the account. This could take 10 days or more.
- 3. SWITCH your Direct Deposit.** Send the "Direct Deposit Switch Form" to your employer, the Social Security Administration or your retirement plan administrator. You can make additional copies if you need to or find them at [www.unitedfinancialcu.org](http://www.unitedfinancialcu.org).
- 4. CHANGE any automatic withdrawals.** The enclosed checklist will help you make sure you don't miss anything! To change your automatic deductions, use the "Automatic Withdrawal Change Form", making additional copies if necessary or find them at [www.unitedfinancialcu.org](http://www.unitedfinancialcu.org).
- 5. CLOSE your old account.** When you have finished steps 1 through 4 and your outstanding checks have cleared, simply submit the "Please Close My Account" form to your financial institution.

## switch

### Direct Deposit Switch Form

Send this form to your present employer, the company that processes your direct deposits, the Social Security Administration or any other organization that sends you recurring payments.

#### CHANGE NOTICE

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

**To whom it may concern:  
Please change my direct deposit to:**

United Financial Credit Union  
PO Box 6430  
Saginaw, MI 48608  
989.777.3620

**Routing Number: 272477241**

**United Financial Credit Union  
Member Account No.:** \_\_\_\_\_

**Account type:**  Checking  Savings

Sincerely, \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

## change

### Automatic Withdrawal Change Form

Send this form and a voided check or deposit slip from your new United Financial CU checking account to the companies that automatically withdraw money from your account.

*\*If you have recurring bill payments on your Debit Card, you will need to change your card information.*

#### CHANGE NOTICE

Date: \_\_\_\_\_

To (the company that makes automatic withdrawals): \_\_\_\_\_

Address: \_\_\_\_\_

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

Regarding my account no.: \_\_\_\_\_

You are currently debiting my account at (financial institution): \_\_\_\_\_

Effective (mo/day/yr): \_\_\_\_\_

Please cancel the above transaction and begin debiting my account at:

United Financial Credit Union

**Routing Number: 272477241**

**United Financial Credit Union  
Member Account No.:** \_\_\_\_\_

**Withdrawal from:**  Checking  Savings

I authorize this change.

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

## close

### Please Close My Account

Send this form to the financial institution that has your current savings/checking account.

#### CHANGE NOTICE

Date: \_\_\_\_\_

Financial Institution: \_\_\_\_\_

Address: \_\_\_\_\_

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

**To whom it may concern:**

**Please close my account.**

**Account No.:** \_\_\_\_\_

**Send the remaining balance to:**

United Financial Credit Union  
PO Box 6430  
Saginaw, MI 48608  
989.777.3620

Sincerely, \_\_\_\_\_

Signature: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

