It's COLSY 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.

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

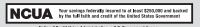
Consumer Credit Cards

Low rates, multiple card options, local services, reward options and much more

☐ US 24 Telephone Teller

Secure account access by phone 24/7





©CUAdvantage.com • 877.799.0784 • 04/18





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.
- 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.
- **5. CLOSEyour 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 ma Please change ı	y concern: my direct deposit to:
United Financi PO Box 6430 Saginaw, MI 4 989.777.3620	al Credit Union 8608
Routing Numbe	er: 272477241
United Financia Member Accou	ıl Credit Union nt No.:
Account type:	☐ Checking ☐ Savings
Sincerely,	
Signature:	
Name:	
Address:	
City, State, Zip: _	
Telephone:	

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 tha			ic withdrawals)
Address:			
City, State, Zip:			
Regarding my accou	unt no.: _		
You are currently de	ebiting my	accour	nt at <i>(financial</i>
institution):			
Effective (mo/day/yr):			
Please cancel the abdebiting my accoun United Financial C Routing Number:	t at: Credit Unic	n	J
5			I
United Financial C Member Account			
Withdrawal from:			
I authorize this char	ige.		
Signature:			
Name:			
Address:			
City, State, Zip:			
Talanhana			

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:				
•				

