

# Switch Kit To Do List

We'll make it easy to switch your accounts to Unitus Community Credit Union. Simply use this handy <u>To Do</u> check list to help you make the switch!

1. Have your new Unitus Community Credit Union account number(s) ready when completing the

authorization forms in the switch kit:	
Account Number:	
Unitus Routing Number: 323075699	
<b>2.</b> Switch direct deposits/automatic of provide for you:	deposits using our <b>ACH Format Letter</b> that any employee can
☐ Employer Deposit	☐ Brokerage Deposits
☐ Government Deposit	Child support or court-ordered deposits
☐ Social Security Administration	☐ Other
<b>3.</b> Switch automatic payments/withdr slips or enroll in Unitus' Free Online	rawals using the <b>Authorization To Change Automatic Payments</b> Bill Pay service:
☐ Mortgage/Rent	□ Auto
☐ Association Fees	☐ Club/Membership Dues
☐ Internet Service	☐ Cable TV/SateIlite
☐ Investments	☐ Credit Cards
☐ Utilities: Electric, Gas, Water	☐ Phone/Cell Phone
☐ Online billing	☐ Other
4. Close all other savings, checking a	and other accounts using Authorization To Close Account slips
Financial Institutions:	
5. Transfer high-rate credit card bala Visa Balance Transfer Request form:	nces to your Unitus Community Credit Union Visa® using the
Credit Cards To Transfer:	
<b>6.</b> Additional options to explore:	
☐ Refinance your auto Ioan at Unitus	Community Credit Union.
☐ Refinance your mortgage loan at U	
☐ Tap your home's equity with one o	f Unitus Community Credit Union's home equity services.
☐ Move your IRA to Unitus Commun	ity Credit Union or Members Financial Services.*
$f \square$ Refer your friends and family to $f Ur$	nitus!
For additional details, or help switchi	ing your accounts to Unitus Community Credit Union, just ask
	any branch or call 503 227 5571 or 1 (800) 452 0900.

#### **Automatic Payment Change** P.O. Box 1937 • Portland, OR 97207-1937 503 227 5571 • 1 (800) 452 0900 Name **Company Name Address Joint Name Address** City/State/Zip Account/Policy # The individual(s) named at left has opened an account with Unitus City/State/Zip Community Credit Union. Effective \_\_\_\_/\_\_\_ all payments for the above account or policy at your organization should be automatically debited from the account information shown at left on this form. Phone Unitus Acct # Signature Date MUST USE 14 DIGIT ACH FORMAT **Routing & Transit # 323075699** Joint Signature Date

8346

Automatic Payment Change	P.O. Box 1937 • Portland, OR 97207-1937 503 227 5571 • 1 (800) 452 0900
Name  Joint Name	Company Name
Address	City/State/Zip Account/Policy #
City/State/Zip	The individual(s) named at left has opened an account with Unitus Community Credit Union. Effective / / all payments for the above account or policy at your organization should be automatically debited from the account information shown at left on this form.
Unitus Acct #  Must use 14 DIGIT ACH FORMAT  Routing & Transit # 323075699	Signature Date
nouting & number # 020070000	Joint Signature Date

834

Automatic Payment Change	P.O. Box 1937 • Portland, OR 97207-1937 503 227 5571 • 1 (800) 452 0900
Name	Company Name
Joint Name	Address
Address	City/State/Zip
	Account/Policy #
City/State/Zip	The individual(s) named at left has opened an account with Unitus Community Credit Union. Effective / / all payments for the above account or policy at your organization should be automatically
Phone ( )	debited from the account information shown at left on this form.
Unitus Acct #  MUST USE 14 DIGIT ACH FORMAT  Parting 8 Transit # 222075699	Signature Date
Routing & Transit # 323075699	Joint Signature Date

### **Authorization to Close Account**



P.O. Box 1937 • Portland, OR 97207-1937 503 227 5571 • 1 (800) 452 0900

Name		Transfer From	
Joint Name			PREVIOUS FINANCIAL INSTITUTION NAME
		Account #	
Address			PREVIOUS ACCOUNT NUMBER
City/State/Zip		financial institution to clo total remaining balance	I hereby authorize and instruct the above named ose the above indicated depository account and send the to my account at Unitus Community Credit Union, as orm. I have notified all parties authorized to draw against ping so.
Unitus Acct #	□ Checking □ Savings	Signature	Date
Routing & Transit # 323075699	☐ Money Market	Joint Signature	Date

#### **Authorization to Close Account**



P.O. Box 1937 • Portland, OR 97207-1937

	`	COMMUNITY CREDIT UNION	303 227 3371 - 1 (000) 432 0300
Name		Transfer From	
Joint Name			PREVIOUS FINANCIAL INSTITUTION NAME
		Account #	
Address			PREVIOUS ACCOUNT NUMBER
		financial institution to close t	<ul> <li>I hereby authorize and instruct the above named he above indicated depository account and send the my account at Unitus Community Credit Union, as</li> </ul>
City/State/Zip		indicated at left on this form. this account to cease doing	I have notified all parties authorized to draw against so.
Phone ( )			
Unitus Acct #		Signature	Date
	☐ Savings		
Routing & Transit # 323075699	☐ Money Market	Joint Signature	Date

## **Authorization to Close Account**

**Routing & Transit # 323075699** 



P.O. Box 1937 • Portland, OR 97207-1937

			COMMUNITY CRED	ITUNION 303 227 337 1 - 1 (500) 432 5360
Name			Transfer From	
Joint Name				PREVIOUS FINANCIAL INSTITUTION NAME
			Account #	
Address				PREVIOUS ACCOUNT NUMBER
			financial institution to o	I hereby authorize and instruct the above named close the above indicated depository account and send the ce to my account at Unitus Community Credit Union, as
City/State/Zip			indicated at left on this this account to cease	form. I have notified all parties authorized to draw against
Phone	( )		tine added in the deduce i	doing co.
Unitus Acct #			Signature	Date
Jiiiuo Aoot #		☐ Savings		

☐ Money Market Joint Signature