

# Change payroll direct deposit form



Please print.

\_\_\_\_\_

Date

\_\_\_\_\_

Employer/Depositor Name

\_\_\_\_\_

Address

\_\_\_\_\_

City

State

Zip

To whom it may concern:

You are currently depositing **MY ENTIRE PAYCHECK / PART OF MY PAYCHECK** (circle one) to the following account:

Old Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

Please stop making deposits to that account and switch them to:

New Financial Institution **Quincy Credit Union** \_\_\_\_\_

Routing Number **211385297** \_\_\_\_\_

Account Number \_\_\_\_\_

If you have any questions regarding this request, please contact me during the

**DAY / EVENING** (circle one) at ( \_\_\_\_\_ ) \_\_\_\_\_ (phone number).

Thank you.

Sincerely,

\_\_\_\_\_

Signature

\_\_\_\_\_

Name (please print)

\_\_\_\_\_

Address

City

State

Zip

Other information your employer may need (Social Security Number, Employee ID Number, Tax Identification Number, etc.)

# Change *automatic withdrawal form*



Please print.

\_\_\_\_\_

Date

\_\_\_\_\_

Name of Company that makes Automatic Withdrawals

\_\_\_\_\_

Address

\_\_\_\_\_

City

State

Zip

To whom it may concern:

You are currently withdrawing \$ \_\_\_\_\_ (amount) for my \_\_\_\_\_

(what payment is for), from account number \_\_\_\_\_, of the following date:

\_\_\_\_\_.

Old Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

Account Number \_\_\_\_\_

Please stop making withdrawals from that account and switch them to:

New Financial Institution **Quincy Credit Union** \_\_\_\_\_

Routing Number **211385297** \_\_\_\_\_

Account Number \_\_\_\_\_

If you have any questions regarding this request, please contact me during the

**DAY / EVENING** (circle one) at ( \_\_\_\_\_ ) \_\_\_\_\_ (phone number).

Thank you.

Sincerely,

\_\_\_\_\_

Signature

\_\_\_\_\_

Name (please print)

\_\_\_\_\_

Address

City

State

Zip

# Close

## checking account form



Please print.

\_\_\_\_\_

Date

\_\_\_\_\_

Financial Institution Name

\_\_\_\_\_

Address

\_\_\_\_\_

City

State

State

Zip

To whom it may concern:

Please close my account \_\_\_\_\_ (account number), effective immediately, and send a check for the remaining balance to me at the address listed below.

Account type(s): Checking Savings Money Market All Accounts

If you have any questions about this request, please contact me during the

**DAY / EVENING** (circle one) at ( \_\_\_\_\_ ) \_\_\_\_\_ (phone number)

Thank you.

Sincerely,

\_\_\_\_\_

Primary Owner's Signature

\_\_\_\_\_

Joint Owner's Signature

\_\_\_\_\_

Primary Owner's Name (please print)

\_\_\_\_\_

Joint Owner's Name (please print)

\_\_\_\_\_

Address

# Let Us Help You Complete Your Move to Quincy Credit Union.

You've joined Quincy Credit Union to benefit from the great rates, low fees, and exceptional products and services that only Members can enjoy. If you're like most of us, you don't have much time to spend moving your accounts from your current financial institution to QCU. No problem! We're going to make it easy.

This switch kit includes a few simple forms to change your direct deposit and any automatic payments from your current checking account to QCU. It only takes a few minutes to begin enjoying the many benefits we have to offer. Please follow these simple steps:

## Open Up *your new accounts*

Your next step is to open your new QCU checking account. Once this account is open, we can start the process of closing your old checking account. An *Open New Checking Account Form* is included within the pocket of this brochure to assist you with opening your checking account.

## Switch Over *your automatic transactions*

The enclosed forms will help you contact the companies and financial institutions which handle your automatic deposits and withdrawals. You'll need to send the form to anyone who debits funds from your old bank account. Simply use the following checklist to keep track of individuals and businesses you may need to contact:

### Direct Deposit

- Your employer's human resources or payroll department
- The company handling your retirement or pension payments
- Social Security Administration

### Anyone who makes automatic withdrawals from your account or automatic charges to your old debit card

- Your mortgage company
- Homeowners insurance
- Auto insurance
- Life insurance
- Utility companies
- Telephone company
- Cable company
- Health club
- Other \_\_\_\_\_

## Close Down *your old accounts*

Included in the pocket of this brochure is a *Close Checking Account Form* that lets your old financial institution know that you wish to close your account, as well as what to do with the remaining funds in the account. Be certain to leave enough funds in your old accounts to allow outstanding checks and automatic withdrawals to clear. This process may take several weeks. Once you've confirmed the old accounts are inactive, you can destroy your old checks, ATM/debit cards, and deposit slips. Or you can bring them here and we will shred them for you.

## You're Done! *Welcome to Quincy Credit Union!*

## Frequently Asked Questions About Moving Accounts to Quincy Credit Union

### How do I close my accounts at other financial institutions and move them to Quincy Credit Union?

Simply complete the *Checking Account Closing Form* included with this kit. We will mail or fax it to your other financial institution. You can even request that the remaining balance on your account is sent to your new Quincy Credit Union account.

### What about any outstanding checks that have written on my current account?

You will need to make certain that all checks and automatic debits have cleared before completely closing your accounts. We will assist you in balancing your check book if necessary.

### What about the bills I pay automatically from my other account?

We will assist you in completing the *Change Automatic Withdrawal Form* enclosed in this kit. We will mail or fax it for you to the companies that receive your automatic payments. It can take up to 30 days from the time they receive your request to switch automatic payments over to your QCU account. If you need additional copies of this form, please let us know — we will make additional copies for you.

### How can I switch my Direct Deposit/Payroll Deduction to QCU?

We can help you complete the *Change Payroll Direct Deposit Form* enclosed in this kit, so you can give it to your employer. Your paycheck will automatically be deposited in your QCU account each pay day. Check with your employer/payroll department to discover when your direct deposit will begin with Quincy Credit Union.