

SWITCH KIT

Getting Started

Make the switch to better banking today!

You can make the move to Coosa Pines Federal Credit Union in three easy steps. Everything you'll need is provided in this handy Switch Kit. We can't wait to welcome you to Coosa Pines Federal Credit Union, where you'll enjoy a better experience for all your banking needs!

1

Open your new account.

Apply online in minutes or visit your local branch to open your new Coosa Pines Federal Credit Union account(s).

2

Switch your direct deposits and automatic withdrawals.

If you have any automatic transactions, use the provided forms to seamlessly switch them to Coosa Pines Federal Credit Union.

3

Close your old account.

Now you're ready to switch. Simply fill out the provided form to close your old account. Any remaining account balance will be transferred to Coosa Pines Federal Credit Union.



FEDERALLY
INSURED
BY NCUA



Excess
Share
Insurance



Coosa Pines
Federal Credit Union

Strength ● Commitment ● Community

SWITCH KIT

Direct Deposit Authorization

Use this form to authorize your employer, retirement and pension funds, or any other agency to deposit your payment directly into your Coosa Pines Federal Credit Union account. Use one form for each direct deposit.

Notification of Direct Deposit Authorization Change

Company or Employer:

Address:

City, State, Zip:

Phone Number:

Employee ID:

(if applicable)

Effective immediately, please deposit the net amount of my check to my Coosa Pines Federal Credit Union account. I authorize (name of depositor) to automatically deposit funds into the account below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.

Place an X next to your desired option

Net amount to CPFCU Checking
 Account # Routing #

Net amount to CPFCU Savings
 Account # Routing #

Signature: Date:

Name:

Address:

City, State, Zip:

Phone Number:

Direct Deposit Checklist:

Use this list to remember all your direct deposits you need to transfer. These are the most common direct deposits.

- Payroll
- Investments
- Retirement Plans
- Social Security



SWITCHKIT

Automatic Withdrawal Authorization

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal. Or, many companies and agencies make it easy to change your account on record online on their website.

Notification of Direct Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone Number:

Please change my automatic withdrawal from the following account:

Financial Institution:

Account # Routing #

Please make all future automatic withdrawals from the following account:

Financial Institution:

Account # Routing #

Thank you.

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature: Date:

Name:

Address:

City, State, Zip:

Phone Number:

Automatic Withdrawal Checklist:

Use this list to remember all your direct deposits you need to transfer. These are the most common direct deposits.

- Home Mortgage
- Auto Loans
- Utilities
- Insurance
- Cable/Internet
- Gym/Club Memberships
- Credit Cards
- Investments
- Subscriptions
- Charity Donations



SWITCH KIT

Account Closure Authorization

Use this form to close your account(s) at your former financial institution. Be sure to verify outstanding items have cleared your old account. You can authorize your remaining funds to be deposited automatically to your new CPFCU account(s) or paid by a check forwarded to your mailing address.

Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution:

Address:

City, State, Zip:

Please close my account:

Account Number: Primary Owner:

Address:

City, State, Zip:

Please send the remaining balance to:

Place an X next to your desired option.

Please deposit directly to my new account at CPFCU.
 Account #: Routing #:

Please forward me a check to my address listed below.

Primary Signature: Date:

Joint Signature:

Name:

Address:

City, State, Zip:

Phone Number:

Congratulations!

You had to sign your name a few times, but submitting these forms completes your switch to a better banking experience. We can't wait to show you the difference a local partner makes.

Welcome to Coosa Pines Federal Credit Union!

