# SWITCH KIT

## **Getting Started** Make the switch to better banking today!

You can make the move to Westmark Credit Union in three easy steps. Everything you need is provided in this handy Switch Kit. We can't wait to welcome you to Westmark Credit Union, where you'll experience the credit union difference for all your banking needs!

### Open your new account.

Apply online in minutes or visit your local branch to open your new Westmark Credit Union account(s). Click here to apply now!

Switch your direct deposits and automatic withdrawals.

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

#### 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 Westmark Credit Union.



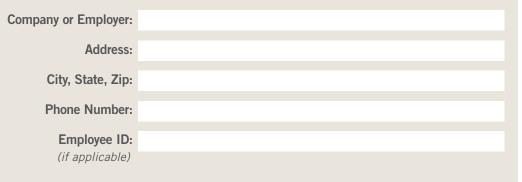


## **Direct Deposit Authorization**

Use your keyboard to fill out this form online, or print the form and complete it by hand.

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

### Notification of Direct Deposit Authorization Change



Effective immediately, please deposit the net amount of my check to my Westmark

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 Westmark Credit Union CHECKING					
Account #			Routing #	324173079	
Net amount to Westmark Credit Unio Account #		it Union	n SAVINGS Routing #		
			Nouting #	324173079	
Signature:			Da	te:	
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







## **Automatic Withdrawal Authorization**

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Use your keyboard to fill out this form online, or print the form and complete it by hand.

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 Withdrawal Authorization Change		Automatic Withdrawal Checklist:
Name of Company:		Use this list to remember all your
Account Number:		automatic payments you need to
Payment Amount:		transfer. These are some of the most commonly used automatic payments.
Address:		
City, State, Zip:		Home Mortgage
Phone Number:		Auto Loans
		Utilities
Please <b>change</b> my autor	natic withdrawal from the following account:	Insurance
Financial Institution:		Cable/Internet
Account #	Bank Routing #	Gym/Club Memberships
Account #	Dalik Routing #	Credit Cards
Please make all <b>future</b> a	automatic withdrawals from the following account:	Investments
Financial Institution:	Westmark Credit Union	Subscriptions
Account #	Bank Routing # 324173079	Charity Donations
Thank you very much		
	nain in effect until I have submitted to you a new authorization, or until me in writing that this authorization has been changed or revoked.	
Signature:	Date:	
Name:		
Address:		
City, State, Zip:		

Phone Number:







## **Account Closure Authorization**

REDIT

You can authorize your remaining balance to be deposited automatically to your new Westmark Credit Union account(s) or paid by a check forwarded to your mailing address.

Use this form to close your account(s) at your former financial institution. Be sure to verify any outstanding items have cleared your old account.

Notification of Account Closure Authorization		Congratulations!
To Whom It May Concern:		You had to sign your name a few timesbut submitting these forms
Financial Institution:		completes your switch to a truly better banking experience. We can't
Address:		wait to show you the difference a local partner makes.
City, State, Zip:		Welcome to <b>Westmark</b> Credit Union!
Please close my account:		Onion:
Account Number:	Primary Owner:	
Address:		
City, State, Zip:		
Account #	o: my new account at Westmark Credit Union. Routing # 324173079 k to my address listed below.	
Primary Signature:	Date:	
Joint Signature:		
Name:		
Address:		
City, State, Zip:		
Phone Number:		

