



Switch Kit



Switch Checklist

To ensure a smooth transition, please take a moment to go over this checklist and make sure you've covered everything you need to begin your relationship with FDLCU.

Did you?

- Meet with a Member Service Representative and set up your new Fond du Lac Credit Union accounts.

My Member Service Rep: _____
- Close your accounts at your former financial institution.
- Change your *automatic transfers* over to your new Fond du Lac Credit Union accounts.
- Change your *direct deposits* to your new Fond du Lac Credit Union accounts. (Payroll, Social Security, Government, Retirement, Investments)
- Change your *automatic payments and drafts* over to your new Fond du Lac Credit Union accounts. (Mortgage, Auto Loan, Health Insurance, Life Insurance, Car Insurance, Credit Card, Utilities, Cable TV, Telephone, Cellular Phone, Online Services, Health Club, Investments & Annuities, Charitable Donations)

My New FDLCU Account Number Information

Savings: _____

Checking: _____

Other _____: _____

Routing Number: 275977450

Welcome to Fond du Lac Credit Union.
We open doors to opportunity.



Authorization to Close

Complete this form and mail it to your former financial institution to notify them that you are closing your account and would like to receive a check for the remaining balance. Please allow time for direct deposits, automatic withdrawals or checks that may already be in process.

Print and complete a copy of this form for each checking account that you have at your existing financial institution.

Please close my (*check one*) checking savings money market account
at:

Please print name of former financial institution

Account number: _____

Name on account: _____

Secondary name on account: _____

Social Security Number: _____

Please send a check payable to me/us for the remaining balance in the above-described account directly to me/us at this address:

Signature(s)

Date



Request and Approval to Change My Automatic Transfer

Print and complete a copy of this form to notify any financial institutions or companies that you are authorizing your automatic transfer (ex: loan payment, insurance payment, transfers to brokerage accounts, transfers to savings accounts, etc.) to your new Fond du Lac Credit Union account. This form is recommended for fixed dollar amount transfers.

You are currently making the following automatic transfer on my behalf:

\$ _____

From: _____
Name of Bank or Company Account #

To: _____
Name of Institution Account #

Schedule/Frequency:

Please use this letter as my authorization to switch the transfer to the below listed account at Fond du Lac Credit Union.

Institution: Fond du Lac Credit Union Routing #: 275977450

My account # at Fond du Lac Credit Union: _____

All other aspects of the transfer should remain the same. Please make this change effective as of: _____
Effective Date

If you need further information to complete the change, I can be contacted at: _____
Phone Number

Signature(s) Date



Authorization to Change Direct Deposit / Automatic Deposits

Print and complete a copy of this form for each depositor with whom you have arranged for direct deposit (ex: payroll, dividends, royalties, etc.) to notify them that you are authorizing the direct deposit to be made to your new Fond du Lac Credit Union account. Please allow sufficient time for change.

My *(check one)* checking savings money market at the following financial institution has been closed:

Please print name of former financial institution

Former Routing Number

Former Account Number

Name(s) on account

Social Security Number

Please establish direct deposit into my new Fond du Lac Credit Union (circle one) checking / savings / money management.

275977450

Fond du Lac Credit Union's Routing Number

My New Fond du Lac Credit Union Account Number

I have enclosed a deposit slip to verify my new Fond du Lac Credit Union account number.

Signature(s)

Date



Authorization to Change Automatic Payment / Draft

Complete this form to cancel automatic payments/drafts (ex: utilities, telephone, etc.) that you make from your former financial institution's account. Print as many copies of this form as you need and mail one to each of the companies that you have an automatic payment/draft with before your next payment is due. Please allow sufficient time for change. This form is recommended for variable dollar amount transfers.

I have closed my checking savings money market
account at:

Please print name of former financial institution

Former ABA Routing Number

Former account number

Name on account

Social Security Number

I hereby authorize automatic payment/draft from my new
account at Fond du Lac Credit Union.

Company to receive this form

My/our account number at this company

275977450
Fond du Lac Credit Union's Routing Number

My New Fond du Lac Credit Union Account Number

Signature(s)

Date

Daytime Phone Number