

# Making the Switch

CONGRATULATIONS! The hardest part is admitting you have a problem, (your current financial institution isn't working for you anymore). Its nobody's fault, well maybe it is their fault, but that's okay. We're going to make this better... together.

The good thing is that you are going to a better place! One where "Our Priority is You" is more than a totally awesome brand message, it's something we live by - really!

## First, Establish an Account at Peninsula

- Apply for a Savings and Checking Account at the Peninsula Credit Union branch nearest you. You'll need a current, government issued photo ID and a second piece of identification such as a social security card, credit card, insurance card, voter registration card, employer ID, etc. You will also need a minimum deposit. Call 360.426.1601 or 800.426.1601 for more information. Together we'll find the account that fits you perfectly.

## Next, Transfer Automatic Payments and Deposits

This is the part you may have been worried about being a little tricky. Don't worry, it's simple, fast and a convenient way of utilizing your new Peninsula account.

- Direct Deposit Change Request**  
This form goes to your employer. With this completed form, they can start sending your paycheck to your account at Peninsula CU. If your employer does not use direct deposit, skip this form.
- Automatic Payments**  
If you make automatic payments to companies through your old debit card you need to contact them and switch to your new Peninsula Credit Union Debit Card. Sometimes a quick phone call is all it takes. If they require written notice, simply complete the **Automatic Payment Change Notification** form included in this switch kit. Now might be a great time to sign up for Bill Payer. With it you can pay and track all of your bills. If you're interested, ask us about enrolling or visit our web site for more information.
- Loan Payoff**  
Any existing loans? No problem. We can refinance them and pay off your old institution. Ask us how.

## You're Almost Done

- Here's what you've been waiting for: **stop using your old account.** Leave enough money in your old account to cover outstanding checks or withdrawals.
- After all outstanding checks have cleared, and you've switched your direct deposit and auto pays to PCU, you can close your account at your old financial institution. The included **Account Closure Request** form will complete the process!
- Take a cleansing breath - You've made it! Welcome to Peninsula.

Any questions about switching your account or using these forms?  
Please feel free to give us a call at 360-426-1601 or  
800-426-1601, or stop by any branch.





## Account Closure Request

Date: \_\_\_\_\_

To: \_\_\_\_\_

Financial Institution Name

Street Address City State Zip

From: \_\_\_\_\_

Primary Account Holder

Joint Account Holder

Joint Account Holder

Street Address

City, State, Zip Code Contact Phone

### RE: Notification to Close Financial Institution Account

I hereby authorize the closure of my account:

Name on the Account: \_\_\_\_\_

Closing Account Number: \_\_\_\_\_

I certify that all checks have cleared the account to be closed and all direct deposits and automatic payments have been stopped. By signing this form, I authorize you to release the remaining funds in my existing account in the form of a cashier's check made payable to me and referencing the account number below:

Financial Institution: **Peninsula Credit Union**, Routing # 325182344 Account # \_\_\_\_\_

Mail To: PCU  
PO BOX 2150  
Shelton, WA 98584

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## Automatic Payment Change Notification

Date: \_\_\_\_\_

To: \_\_\_\_\_

Billers Company Name

Street Address

City

State

Zip

From: \_\_\_\_\_

Primary Account Holder

Joint Account Holder

Joint Account Holder

Street Address

City, State, Zip Code

Contact Phone

### RE: Notification to Change Automatic Payment

Please note the change in my automatic payment for account \_\_\_\_\_ to my new account:  
Payee Account Number

Financial Institution: **Peninsula Credit Union (check one)**

Please debit my checking account using my checking account number.

ABA/Routing #325182344 Account # 7890 \_\_\_\_\_

Please debit my checking account using my VISA Debit Card

# \_\_\_\_\_ Expiration \_\_\_\_\_

I hereby authorize the organization above to change my automatic payment effective \_\_\_\_\_

This authorization will remain effective until I provide written notice of change or cancellation.

Signature \_\_\_\_\_

Date \_\_\_\_\_

# Loan Payoff

Date: \_\_\_\_\_

Please use the enclosed funds to payoff: (check one)    Loan    Line of Credit    Credit Card

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

## Account Information:

10 Day Payoff Amount: \_\_\_\_\_ Payoff Good Through: \_\_\_\_\_

**Please send receipt of account closure to me at the following address:**

Name: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name