



# Switch Kit

**You work hard for your money,  
make it work harder for you.**

Switching banks doesn't have to be a hassle. Union Savings and Loan Association can make your switch a walk in the park.

- 1. Open a new account with USLA**

Stop into any of our local branches to open an account. Bring your driver's license with you and have your social security number and birth date ready to provide to the customer service representative. Some USLA accounts require a minimum balance to open the accounts, be prepared to make a deposit into your new account.
- 2. Move auto payments and deposits to new account**

We've provided the forms you'll need, just fill in the blanks and sign. Or, bring us a list of your payees and companies that credit your account, and we'll help you.
- 3. Close old account**

We've provided a letter that notifies your old bank about the accounts you are closing and gives directions for disbursement of any remaining funds. Just make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.
- 4. Quick checklist**

To help you keep track of your switch, we've included a quick checklist. You can use this form to track all of the information you need to move your direct deposits, payments, and close your old account. Or, one of our New Account Specialists can help.

Be sure to shred or destroy any unused checks, deposit slips and ATM or debit cards. Don't forget about other items such as your savings account, safe deposit box, loans and lines of credit. We can help move these accounts as well.



# Authorization for Direct Deposit

To: \_\_\_\_\_  
(Employer)

Please Switch My Direct Deposit To:  
**Union Savings and Loan Association**

Beginning On: \_\_\_\_\_  
(Date)

New Account #: \_\_\_\_\_  
(Attached is voided check)

New Bank Routing #: 274971101

Switching From: \_\_\_\_\_  
(Name of previous Financial Institution)

Old Account #: \_\_\_\_\_

Old Bank Routing #: \_\_\_\_\_

Account Holder: \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

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





# Authorization for Automatic Withdrawals

Service Provider: \_\_\_\_\_

My Account # With Your Organization: \_\_\_\_\_

Please Switch My Automatic Withdrawals To:  
**Union Savings and Loan Association**

Beginning On: \_\_\_\_\_  
*(Date)*

Type of Account: \_\_\_\_\_  
*(Checking or Savings)*

New Account #: \_\_\_\_\_  
*(Attached is Voided Check)*

New Bank Routing #: 274971101

Switching From: \_\_\_\_\_  
*(Name of Previous Financial Institution)*

Old Account #: \_\_\_\_\_

Old Bank Routing #: \_\_\_\_\_

Account Holder: \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

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





# Account Closing Request

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

To: \_\_\_\_\_  
(Financial Institution Name)

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

City, State, Zip: \_\_\_\_\_

From: \_\_\_\_\_  
(Names on Account)

Last 4 Digits of Social Security #: \_\_\_\_\_

Account #1	Account Type	
	Account	
	Send Payment at Once <input type="checkbox"/> (CHECK ONE)	Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE)
Account #2	Account Type	
	Account	
	Send Payment at Once <input type="checkbox"/> (CHECK ONE)	Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE)
Account #3	Account Type	
	Account	
	Send Payment at Once <input type="checkbox"/> (CHECK ONE)	Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE)

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

City, State, Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Signature: \_\_\_\_\_

Joint Account Holder Signature: \_\_\_\_\_

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





## Switch Checklist

We make it easy to switch to Union Savings and Loan Association. Just follow our Simple checklist to make your move as smooth as possible.

### Remember to:

#### Open a new Account

Open your new account(s) at USLA.

#### Fill Payment Forms

Fill out the enclosed Direct Deposit, Automatic Deposit and Automatic Payment forms.

#### Check your old account

Make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.

#### Close your old account

Close your account by notifying your old bank with the enclosed form.

#### Destroy old information

Destroy all unused checks, deposit slips, ATM and debit cards. Keep your new USLA routing and account numbers handy for direct deposit and automatic Withdrawal requests.





# Track Your Switch

You can use this form to keep track of all the information you need to move your direct deposits, payments and close your old account.

## Your Union Savings and Loan Association

Account #: \_\_\_\_\_

## Your Union Savings and Loan Association

Routing #: 274971101

## Direct Deposit

Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		
Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		
Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		

## Automated Payments

Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		
Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		
Account #1	Company (Name/Address)		
	Date Letter Mailed		Status
	Estimated Switching Date		



# Track Your Switch

## Outstanding Checks

One	Outstanding Check Payable To	
	Outstanding Check #	
	Outstanding Check Amount	
	Date Cleared	
Two	Outstanding Check Payable To	
	Outstanding Check #	
	Outstanding Check Amount	
	Date Cleared	
Three	Outstanding Check Payable To	
	Outstanding Check #	
	Outstanding Check Amount	
	Date Cleared	
Four	Outstanding Check Payable To	
	Outstanding Check #	
	Outstanding Check Amount	
	Date Cleared	
Five	Outstanding Check Payable To	
	Outstanding Check #	
	Outstanding Check Amount	
	Date Cleared	

*(Make sure all your outstanding checks have cleared)*