

# SWITCH KIT

## Getting Started

### Make the switch to better banking today!

You can make the move to Bay 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 Bay Federal, 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 Bay Federal 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 Bay 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 can be transferred to Bay Federal Credit Union or mailed to you via check.



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# SWITCH KIT

## Direct Deposit Authorization

You can use your keyboard to fill out this form online, or you can print the form and complete it by hand.

Use this form to authorize your employer, retirement and pension plans, or any other agency to deposit your payment directly into your Bay Federal 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 in to my Bay 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.

Account Number:  Routing Number:

Signature:  Date:

Name:

Address:

City, State, Zip:

Phone Number:

### Direct Deposit Checklist:

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

- Payroll
- Investments
- Retirement Plan
- Social Security



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Use this form to authorize your employer, retirement and pension plans, or any other agency to deposit your payment directly into your Bay Federal 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 in to my Bay 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.

Account Number:  Routing Number:

Signature:  Date:

Name:

Address:

City, State, Zip:

Phone Number:

### Direct Deposit Checklist:

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

- Payroll
- Investments
- Retirement Plan
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# SWITCH KIT

## Automatic Withdrawal Authorization

You can use your keyboard to fill out this form online, or you can print the form and complete it by hand.

Use this form to authorize a change to any automatic payments, deductions, or other withdrawals from your account. Use one form for each automatic withdrawal. As another option, many companies and agencies make it easy to change your account on their website.

### Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone Number:

Please cancel all automatic withdrawals from **my old institution:**

Financial Institution:

Account Number:  Bank Routing Number:

Please make all future automatic withdrawals from **my new institution:**

Financial Institution:

Account Number:  Bank Routing Number:

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 the automatic payments you need to transfer. These are some of the most commonly used automatic payments.

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



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# SWITCH KIT

## Account Closure Authorization

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

Use this form to authorize your employer, retirement and pension plans, or any other agency to deposit your payment directly into your Bay Federal account or to mail the payment to you. Use one form for each direct deposit.

### Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution:   
Address:   
City, State, Zip:

Please Close My Account(s):

Account Number:  Account Number:   
Account Number:  Account Number:   
Primary Owner:   
Address:   
City, State, Zip:

Please Send My Remaining Balance To:

*Please place a ✓ next to your desired option.*

Please deposit funds directly into my new account at Bay Federal Credit Union.

Account Number:  Routing Number:

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 truly better banking experience. We can't wait to show you the difference a local partner makes.

**Welcome to Bay Federal Credit Union!**



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