

Switch Kit -- It's so Easy!

Here is an easy way to help you make a smooth and easy transition to our products and services. This kit includes everything you need for a quick change. If you need assistance completing the form, stop by one of our branches or give us a call. Our staff will walk you through the simple ABC's of changing your accounts to Securityplus FCU.

A – Open Your New Accounts

- ❑ Your first step is to open your new Securityplus Federal Credit Union Share account. Once this account is in place, you have access to all the credit union has to offer. It's easy; just return the enclosed application with your initial deposit of \$7 to open your account.

B – Close Your Old Accounts

- ❑ **B**e sure to leave sufficient funds in your old account long enough for outstanding checks and automatic withdrawals to clear. Once all outstanding transactions have posted, then you can close the old account completely. You can also ask your previous financial institution to send you a check for the balance of the account.

C – Make the Change

Enclosed you will find the required information sheets to help make your changeover easier. Use these convenient forms to close your accounts, and to change your direct deposit and automatic withdraws.

D – When You're Done

Check the boxes next to the item's you've completed and keep this checklist handy. As you continue completing items, simply check off the boxes.

- ❑ Make sure all checks have cleared on your current checking account
- ❑ Make certain enough funds are available in your account to cover any automatic payments that may still need to be withdrawn
- ❑ Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties
- ❑ Send written notice to your direct deposit vendors (payroll, social security, CD interest payments, etc.) of the change in your financial institution
- ❑ Send written notice to your vendors who automatically take your payments from your checking account (utilities, insurance companies, internet service providers, banks, etc.) that you are closing the account
- ❑ Send notification of new account information to vendors who you want to continue to generate automatic withdrawals instead of paying by BillPay; or use this notification to start a new automatic payment with a vendor
- ❑ Send written notice to the financial institution that you are closing the account

E – Enjoy Everything the Credit Union Has to Offer

Visit our website, www.securityplusfcu.org, and see all the benefits of e-Banking, our online banking service. With e-Banking you can:

- Check account balances
- Pay bills with Bill Payer
- Transfer funds
- Print copies of cleared checks (front and back)
- View your VISA account information
- Order checks
- And much more!

These forms will help you contact the companies and financial institutions, which handle your automatic deposits and withdrawals. If you need assistance completing the forms, stop by one of our branches or give us a call at 410-965-8908 or 1-866-4SECPLUS. We'd be happy to help!

Playing the numbers. To find the account numbers for your old account, look at the bottom of your checks for a series of numbers. Bank routing numbers are the first nine (9) digits of the series, and begin with a number between 01 and 12, or 21 and 32.