

## The Switch Kit

Ready to switch to Vantage West Credit Union?

This switch kit contains forms you can easily fill out, print and send to your former financial institution and others to notify them you are switching to Vantage West. This will ensure a smooth transition.

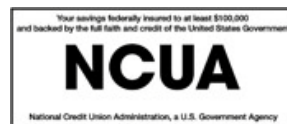
Here are five easy steps to great financial service.

1. Open your Vantage West Savings account at any branch, or open an [eSavings account online](#) with an initial deposit of \$5 or more, and open your Checking account or [eChecking Account online](#) with an initial deposit of \$20 or more. Check out all our [checking account options](#) here.

Ask for your free Checking (Debit)/ATM card and order a box of Vantage West checks. Make note of your account number here \_\_\_\_\_ and the Vantage West routing number is 322174708. Your new checks and free Checking (Debit)/ATM card will arrive by mail in 7-10 business days.

2. Stop using your old account, and let all your outstanding checks clear. This might take up to 10 business days. Destroy your old unused checks, deposit slips, and your old ATM and debit cards.
3. Change your direct deposits. Fill out the **Direct Deposit Form** included in the following switch kit and give to your employer's payroll department, the Social Security Administration or your retirement plan. You will need to include a new voided check.
4. Change any automatic payments or withdrawals. Use the **Automatic Withdrawal Form** included in the following switch kit, to change any automatic withdrawals or payment services. Don't forget any payments that use your old debit card number.
5. Close your old account by sending the **Authorization to Close my Account** notification provided in the following switch kit to your old financial institution referencing your new account number. Your old institution will send a check directly to your new Vantage West account for the remaining balance in your account.

Vantage West Credit Union, P. O. Box 15115, Tucson, AZ 85708



Federally Insured by NCUA

**Authorization to Change my Automatic Withdrawal**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
COMPANY NAME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

To Whom It May Concern:

This is to inform you that I have changed financial institutions. You are currently withdrawing \$\_\_\_\_\_ (or paying my current bill amount) from the following account:

Old Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

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

For \_\_\_\_\_ (Payment Reason)

On \_\_\_\_\_ (Approximate Date of Month)

Please stop making withdrawals from this account on \_\_\_\_\_ and start making them from my new Vantage West Credit Union account:

Vantage West routing number: 322174708

My Vantage West account number: \_\_\_\_\_

If you have any questions, please let me know.

Phone # \_\_\_\_\_

Sincerely,

**X** \_\_\_\_\_  
SIGNATURE (actual signature required)

\_\_\_\_\_  
NAME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

**Authorization to Change my Direct Deposit**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
COMPANY MAKING DIRECT DEPOSIT

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

To Whom It May Concern:

You are currently depositing my paycheck in whole or in part into the following account:

Old Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

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

Please begin making these automatic deposits into my new account at Vantage West Credit Union:

Vantage West routing number: 322174708

My Vantage West account number: \_\_\_\_\_

If you have any questions, please let me know.

Phone # \_\_\_\_\_

Sincerely,

X \_\_\_\_\_  
SIGNATURE (actual signature required)

\_\_\_\_\_  
NAME

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

**Authorization to Close my Account**

\_\_\_\_\_  
DATE

\_\_\_\_\_  
FINANCIAL INSTITUTION

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

To Whom It May Concern:

Please close the following account # \_\_\_\_\_ and send a check for the remaining balance to my Vantage West Account at the address below.

If you have any questions about this request, please contact me as soon as possible at the following number.

Phone # \_\_\_\_\_

Sincerely,

X \_\_\_\_\_  
SIGNATURE (actual signature required)

X \_\_\_\_\_  
CO-SIGNER SIGNATURE (actual signature required)

\_\_\_\_\_  
NAME (please print)

\_\_\_\_\_  
CO-SIGNER NAME (please print)

**Vantage West Credit Union**

Ref: \_\_\_\_\_  
(Name)

\_\_\_\_\_  
(Account Number)

**P.O. Box 15115 Tucson, AZ 85708**

## Checklist

**Keep this checklist handy and check the boxes next to the items as you complete them.**

Open your new Vantage West Credit Union Account

Make certain enough funds are available in your old account to cover any automatic payments and checks that may yet need to be withdrawn

Double check maturity dates of old accounts in order to avoid possible penalties

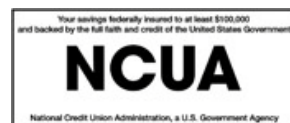
Make sure all checks and automatic payments and scheduled bill payments have cleared on your checking account

Send written notice to your direct deposit vendors (payroll, social security, CD interest payments, etc.) of the change in your relationship.\*

Send written notice to the old financial institution that you are closing the account.\*

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.\*

\*A form is available in this Switch Kit for this purpose.



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