

THE SWITCH KIT

Ready to switch to Vantage West?
Just 3 Easy Steps to Great Financial Service

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

1 Establish membership at Vantage West. (To do so, **OPEN** an account with an initial deposit of \$5 placed into a Regular Share (Savings) Account. *This is called your "par value."* Then, open a checking account with a minimum deposit of just \$20.)

▼ Ask for your free checking (debit) / ATM card and order a box of Vantage West checks. Make note of your account number here _____. Vantage West's routing number is 322174708. Your new checks and free checking (debit) / ATM card will arrive by mail in 7-10 business days.

2 **CHANGE** your direct deposits, automatic payments, and automatic withdrawals. Fill out the AUTHORIZATION TO CHANGE MY DIRECT DEPOSIT form and give it to your employer's payroll department, the Social Security Administration, or your retirement plan administrator. You will need to include a new voided check. Use the AUTHORIZATION TO CHANGE MY AUTOMATIC WITHDRAWAL form to change automatic withdrawals or payment services. Don't forget any payments that use your old debit card number.

3 **CLOSE** your account by sending the AUTHORIZATION TO CLOSE MY ACCOUNT form to your old financial institution and referencing your new account number. Your old institution will send a check directly to Vantage West to deposit your remaining balance into your new account.

Note: Allow up to ten business days for outstanding checks to clear from your old account. Destroy old unused checks, deposit slips, ATM, and debit cards.



Federally Insured by NCUA



Vantage West
CREDIT UNION

P.O. Box 15115 ▼ Tucson, AZ 85708

THE SWITCH KIT CHECKLIST

Keep this list and check the boxes next to the tasks 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enough funds are available in your old account to cover any automatic payments and checks that may yet need to be withdrawn.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 (AUTHORIZATION TO CHANGE MY DIRECT DEPOSIT form) to vendors (payroll, social security, CD interest payments, etc) of the change in your relationship.
- Send written notice (AUTHORIZATION TO CLOSE MY ACCOUNT form) to your old financial institution to let them know you are closing the account.
- Send written notice (AUTHORIZATION TO CHANGE MY AUTOMATIC WITHDRAWALS form) to vendors that automatically take payments from your checking account (utilities, insurance companies, internet service providers, banks, etc) to let them know you are closing an account.



Federally Insured by NCUA

101613CLG



Vantage West
CREDIT UNION

P.O. Box 15115 ▼ Tucson, AZ 85708

AUTHORIZATION TO CHANGE MY AUTOMATIC WITHDRAWAL

Today's Date _____
Auto Withdrawal Institution _____
Address _____
City, State, Zip _____

To Whom It May Concern:

This is to inform you that I have changed financial institutions.
You automatically withdrawal \$ _____ OR pay my bill amount from the following account.
The name of my old financial institution is _____.
Their Routing # _____ My Account # _____
I had auto withdrawal in place for _____, and the approximate
(Payment Reason)
auto withdrawal date set for _____.
Please stop making withdrawals from this account on _____ and start making them
(Date)
from my new Vantage West Credit Union account.

The Vantage West routing number is 322174708. My Vantage West account number is _____.

If you have any questions, please let me know. My phone number is (____) ____ - ____.

Sincerely,

x _____

Name _____

Address _____

City, State, Zip _____



Vantage West
CREDIT UNION

P.O. Box 15115 ▼ Tucson, AZ 85708

AUTHORIZATION TO CHANGE MY DIRECT DEPOSIT

Today's 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.

The Vantage West routing number is 322174708. My Vantage West account number is _____.

If you have any questions, please let me know. My phone number is (___) ___ - ____.

Sincerely,

x _____

Name _____

Address _____

City, State, Zip _____



Vantage West
CREDIT UNION

P.O. Box 15115 ▼ Tucson, AZ 85708

AUTHORIZATION TO CLOSE MY ACCOUNT

Today's Date _____

Financial Institution _____

Address _____

City, State, Zip _____

To Whom It May Concern:

Please close account # _____, and send a check for the remaining balance to my Vantage West account at the address below.

*Vantage West Credit Union
PO Box 15115
Tucson, AZ 85708*

Name _____ Vantage West Acct# _____

If you have questions about this request, please contact me. My phone number is (___) ___ - ____.

X _____
SIGNATURE

X _____
CO-SIGNER SIGNATURE

NAME (Please print)

CO-SIGNER NAME (Please print)