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# Switch Kit

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## It's Simple to Switch Your Checking Account to Eagle Credit Union!

Change is good, especially when it's switching your checking account to Eagle Credit Union. We make it so easy, you'll wonder why you didn't do it sooner. By switching your direct deposit and automatic withdrawals to Eagle Credit Union, you can rest assured that your funds are safe, secure and accessible 24 hours a day, 7 days a week. We'll walk you through the simple steps and have you set up in no time!

### STEP ONE

#### Join Eagle Credit Union

- Visit [www.eaglecreditunion.com](http://www.eaglecreditunion.com) to apply for membership.
- Call (209) 444-2400 or (800) 924-3133 and have a membership application mailed to you.
- Stop by one of our branches to join

### STEP TWO

#### Set Up Direct Deposit

- For Social Security deposits, call the Social Security Administration at (800) 772-1213 or visit one of our branches for assistance.
- For military deposits, visit [www.dfs.mil](http://www.dfs.mil). Click on **myPay** and log in with your Social Security number. If you need a PIN to finish logging in, click on the **New PIN** button to get a code for completing the direct deposit instructions.
- For payroll and other deposits, including dividend and interest funds, allotments and government pay, please print out and complete the enclosed Direct Deposit form for each request. You may mail the form, visit one of our branches, or call the member service center for assistance.

### STEP THREE

#### Direct Your Automatic Payments to Eagle Credit Union

- On the enclosed Worksheet, list your current automatic withdrawals and any others you would like to establish.
- Print out an Automatic Withdrawal Change/Request form for each current or new withdrawal on your list.
- Completely fill out each Automatic Withdrawal form. Your Eagle Credit Union checking account number and signature authorize the company to withdraw payment from your new checking account.
- Mail each form to the appropriate company. Your automatic withdrawals will be established at Eagle Credit Union within 30 to 60 days.

### STEP FOUR

#### Switch Your Online Banking and Bill Pay Service

- Make a list of all your bills. You will need each payee's company name, complete address, phone number, and account number.
- Visit [www.eaglecreditunion.com](http://www.eaglecreditunion.com). Sign up for our free Bill Pay service through Online Banking and enter your payee's information.
- Cancel your current bill pay service before you begin paying bills with Eagle Credit Union's online bill pay.

### STEP FIVE

#### Close Your Old Checking Account

- After your Eagle Credit Union Direct Deposit and automatic withdrawals have been established and all outstanding checks have cleared, close your checking account at the other financial institution.

Post Office Box 8266  
Stockton, CA 95208-0266  
800-924-3133  
www.eaglecreditunion.com



## STEP TWO: Direct Deposit Change/Request

Give this form to organizations with whom you'd like to arrange direct deposit of funds.

Please change or establish my direct deposit per my instructions.

Account Holder's Name: \_\_\_\_\_

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

Please deposit the specified amount to the account listed below:

**Eagle Credit Union**  
**Routing/Transit Number: 321177861**

Savings Account # \_\_\_\_\_

Entire Pay or  Amount of Deposit: \$ \_\_\_\_\_ per pay period

Checking Account # \_\_\_\_\_

Entire Pay or  Amount of Deposit: \$ \_\_\_\_\_ per pay period

I hereby authorize \_\_\_\_\_ to honor the direct deposit instructions indicated above. This request is to remain in effect until changed by me in writing by submitting a new Direct Deposit Authorization. I also agree that, in consideration of this service, any funds erroneously deposited in my account in excess of my authorized amount or then current salary entitlement may be withdrawn by \_\_\_\_\_ without liability or prior notice.

\_\_\_\_\_  
Signature of Employee

\_\_\_\_\_  
Date



## STEP THREE (A): Worksheet

Use this form to gather essential account information about each company you authorize to make automatic withdrawals from your Eagle Credit Union checking or savings account.

Copy and use as many worksheets as you need for listing all the companies you want to contact. After you've gathered the account information, complete an **Automatic Withdrawal Change/Request** (Step Three B) form for each company on your list. Make certain you sign each Automatic Withdrawal Change form. Mailing these forms initiates the automatic withdrawal process, which usually takes 30 to 60 days.

**TO:**

Company Name					
Billing Address			City	State	Zip
Billing Account #	Amount Withdrawn	Name as it appears on their records			

**TO:**

Company Name					
Billing Address			City	State	Zip
Billing Account #	Amount Withdrawn	Name as it appears on their records			

**TO:**

Company Name					
Billing Address			City	State	Zip
Billing Account #	Amount Withdrawn	Name as it appears on their records			

**TO:**

Company Name					
Billing Address			City	State	Zip
Billing Account #	Amount Withdrawn	Name as it appears on their records			





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## STEP FIVE: Close Account Request

**Prior to closing your account, confirm that all checks and transaction have cleared and that your Direct Deposit and automatic withdrawals have been established on your Eagle Credit Union account.**

**Please close this checking account per my instructions.**

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

\_\_\_\_\_  
Checking Account Number to be Closed

\_\_\_\_\_  
Name on Account to be Closed

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

\_\_\_\_\_  
Address on Account to be Closed

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

**I authorize the transfer of any remaining balance to my Eagle Credit Union account number:**

\_\_\_\_\_  
Eagle CU Account Number

Routing #: 321177861

X \_\_\_\_\_  
Primary Account Holder's Signature

\_\_\_\_\_  
Date