

# Checking Switch Kit

## **Moving your checking account has never been easier!**

Thank you for choosing to bank with EvergreenDIRECT Credit Union. We are dedicated to ensuring your transition is a smooth one. The four easy steps below will help us guide you through the process of switching your checking account from another institution to EvergreenDIRECT.

### **1. Get Organized**

- Gather all important information concerning your existing account.
- Review your last 6 month statements and note all automatic payments, remembering that not all automatic payments come out monthly. Some automatic payments, such as insurance premiums or association dues, may occur on a basis other than monthly.

### **2. Switching Your Direct Deposit**

- Complete the enclosed Direct Deposit form or ask for the specific form you need, such as State of Washington or Federal Direct Deposit form.
- To change your Social Security Direct Deposit, you can call 800-772-1213 or visit [www.godirect.gov](http://www.godirect.gov).

### **3. Switching Your Automatic Payments**

- Complete the enclosed Automatic Payment form and forward to the company to be paid by automatic payment. If you have more than one automatic payment, we will be happy to provide you with additional copies of the Automatic Payment Change Letter.
- Want more control over your automatic payments? An alternative to automatic payments is our FREE Bill Payer. With Bill Payer, all automatic payments can be set up for a one time payment or recurring payments, all managed by you. Use the enclosed Bill Payer Set-Up Sheet to get started.

### **4. Request to Close Account**

- Complete and sign the enclosed Request to Close Account letter and mail to your previous financial institution after all checks have cleared, Direct Deposits have been changed, and Automatic Payments have been transferred to your EvergreenDIRECT Credit Union account.



# Direct Deposit

Complete and sign this form to change your existing direct deposit or to establish a direct deposit. Turn this form in, along with a voided check from your EvergreenDIRECT account, to your employer or other company from which you are receiving a direct deposit.

I would like to:

- Change my existing Direct Deposit
- Establish a Direct Deposit

## Member Information:

Member Name: \_\_\_\_\_  
Last First M.I.

SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

## Credit Union Information:

EvergreenDIRECT Credit Union Routing #325181002

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

Account Type:  Checking  Savings

## Employer / Company Information:

Employer / Company Name: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

I hereby authorize to have my Direct Deposit sent to my account with EvergreenDIRECT Credit Union.

Member Signature: \_\_\_\_\_ Date: \_\_\_\_\_



# Automatic Payment

Name of Company: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

To Whom It May Concern,  
I would like to change the origination of my automatic payment with your company.

Former Institution: \_\_\_\_\_

Routing Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

As of \_\_\_\_\_ 20\_\_\_\_\_, please stop debiting from the above account and begin debiting from my account with EvergreenDIRECT Credit Union, shown below.

**EvergreenDIRECT Credit Union**

Routing # 325181002

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

Please send me written confirmation of my change and when it will become effective.

Signature: \_\_\_\_\_

## Member Information:

Member Name: \_\_\_\_\_  
Last First M.I.

SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_



# Request to Close Account

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Name of Financial Institution: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

To Whom It May Concern,

This letter serves as authorization to close my account. Please send me a check for the remaining balance to:

- my home address
- EvergreenDIRECT Credit Union  
PO Box 408  
Olympia, WA 98507-0408

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_  
Last First M.I.

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_



# Bill Payer Set-Up

Our Bill Payer program allows you to establish recurring payments such as a mortgage payment, rent, health club dues, etc. or pay one-time payments. You now have the control of your money! Use this sheet to get organized and help you easily set up your bills online.

Name of Company: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

Name of Company: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

Name of Company: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

Name of Company: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

Name of Company: \_\_\_\_\_

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

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

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

