



SWITCH ME KIT

We'd like to make it convenient for you to change all of your banking business to R-G Federal Credit Union with our "Switch Me Kit". Follow these steps and please use the forms provided to make your transition to RGFCU a smooth process.

Here's a checklist of things to take care of as you switch your checking account to RGFCU.

- Make sure all of your checks have cleared.
- Make sure you leave enough funds in the account being closed, so that any automatic payments will be made prior to your switch.
- Send written notice to your employer and all sources that send direct deposits to your old account to notify them of your new account with RGFCU.
- Send written notices to any creditors or companies that take automatic payments from your old account and notify them of your new account at RGFCU.
- Once all of the above items are complete, send written notice to your former financial institution directing them to close your account and send the remaining balance to RGFCU.

It's so easy!

We have provided the forms that you will need to make the "switch" in this kit. Print the entire kit, or only the pages/forms you need.

Direct Deposit-For Employers

Automatic Payments –To Creditors

Account Closure form -To former Financial Institution



Direct Deposit Change Form

Examples: Payroll, Dividends, Financial aid etc.

To: _____
Company Making the Direct Deposit

Address



Please switch my direct deposit that is currently going to:

Name of former Financial Institution

Account #

Effective ____/____/20____, please begin sending my Direct Deposit to:

R-G Federal Credit Union

Routing # 301080392

Account # _____

Checking/Draft _____ Savings/Share _____

I hereby authorize my direct deposit to change as indicated above:

Signature

Date

Printed name

Phone #

Social Security #

Automatic Payment Change

Examples: Utilities, car payments, credit payments, insurance payments etc...

To: _____

Company Name

Address

Account #



Please stop my automatic payments that are currently being withdrawn from:

Name of former Financial Institution

Account#

Effective ____/____/20____, please begin withdrawing my payments from my new Financial Institution.

R-G Federal Credit Union

Routing #301080392

Account # _____

Checking/Draft _____ Savings/Share _____

I hereby authorize my automatic payments to change Financial Institutions as indicated above.

Signature

Date

Printed Name

Telephone #

Social Security #

Account Closure Request

To: _____
Financial Institution name

Address

Account #

By my signature I hereby authorize the closure of my account(s). I have made sure all of my checks have cleared, and I have made sure that all direct deposits and withdrawals have been cancelled.



Please send my remaining balance of funds in this account to:

**R-G Federal Credit Union
128 West Markey Road
Belton, MO 64012**

For Deposit to account # _____

Signature

Date

Printed name

Phone #

Social Security#