



## Switch Your Automatic Transactions

## Close Your Old Account

# Checking Account Switch Kit

## Easy as 1-2-3!

### Join the Credit Union

Credit Union membership will provide easy access to FREE checking, FREE online banking, FREE eStatements and many other FREE or low fee services. You'll also enjoy higher yields on savings and lower rates on loans, along with the personalized service that only a Credit Union can provide.

We've designed this kit to make it easy for you to switch all of your accounts to Pasadena FCU. It includes simple step-by-step instructions and forms that will make your switch a snap. Of course, if you have any questions, we'll be happy to assist you. Call a Member Service Representative at 626/ 799-0882 or stop by our branch.



**PASADENA**  
FEDERAL CREDIT UNION



Our attached forms can be used to notify companies that you've switched your account to Pasadena FCU. Just fill in the required information, make copies for each applicable company and mail them out.

Here are some examples of the kinds of companies that you may want to notify:

**Direct Deposit.** Companies or government agencies that regularly deposit funds into your checking or savings account. These might include:

- Your employer
- Your pension plan administrator\*
- The Social Security Administration\*

**Automatic Withdrawals.** Companies that regularly make electronic withdrawals from your checking account or automatically assess charges to your credit card or debit card. These might include:

- Your mortgage company
- Your insurance company
- Your cable company
- Your Internet service provider
- Your health club

Prior to closing your old account, be sure to leave in enough money to cover any outstanding checks and automatic withdrawals. Once all charges have been paid, ask your previous financial institution to send your remaining balance(s) to you or your new Pasadena FCU account(s). Then, destroy your old checks, ATM cards, debit cards and deposit slips.

### Important Numbers for your records:

#### Pasadena Federal Credit Union Account Number

**322280728**

#### Pasadena Federal Credit Union Routing Number

To find the account numbers for your old account, look at the bottom of your checks for a series of numbers. Bank routing numbers are the first nine digits of the series.

⌋123456789⌋	⌋1234567890⌋	⌋1234
Bank routing number	Account number	Check Number

Once you've finished these steps, your switch will be complete. Welcome to the Credit Union! We look forward to serving all of your financial needs.

\*If you receive deposits other than payroll direct deposit, such as retirement or Social Security payments, contact the depositor for instructions on changing these deposits to your new Credit Union account.



# Checking Account Switch Kit. Easy as 1-2-3!

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## Notification of Direct Deposit Authorization Change

This form goes to your employer.

Employer: \_\_\_\_\_

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

City: \_\_\_\_\_

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

**Please direct all future payroll direct deposits to the following accounts:**

Financial Institution: **Pasadena Federal Credit Union**

Routing # : **322280728**

**Net paycheck to** (check one):

**Checking Account #:** \_\_\_\_\_

**Savings Account #:** \_\_\_\_\_

Start Date \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
month day year

Name: \_\_\_\_\_

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

City: \_\_\_\_\_

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

Other information your employer may need:

\_\_\_\_\_  
(Employee ID #, etc.)

Signature \_\_\_\_\_ Date \_\_\_\_\_

This is a change in authorization for your Direct Deposit. If this change means that you will no longer have sufficient funds in your previous account to cover any automatic withdrawals you may have, please call that company and change the automatic withdrawal to your new Credit Union account. You can also use the Notification of Automatic Withdrawal Change form.

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## Notification of Automatic Withdrawal Change

This form goes to all companies with whom you have automatic withdrawals. Make copies as needed.

**To Whom it May Concern:**

\_\_\_\_\_  
(Name of Company)

Account #: \_\_\_\_\_

Payment Amount: \$ \_\_\_\_\_

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

City: \_\_\_\_\_

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

**Please discontinue my automatic withdrawal from the following account:**

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

Routing # \_\_\_\_\_

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

**Please make all future automatic withdrawals from the following account:**

Financial Institution: **Pasadena Federal Credit Union**

Routing # : **322280728**

Account #: \_\_\_\_\_

Name: \_\_\_\_\_

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

City: \_\_\_\_\_

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

Signature \_\_\_\_\_ Date \_\_\_\_\_

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## Notification of Account Closure

This form goes to the financial institution where you will be closing your account.

**To Whom it May Concern:**

\_\_\_\_\_  
(Financial Institution Name)

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

City: \_\_\_\_\_

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

**Effective on:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
month day year

**Please close my account:**

Account #: \_\_\_\_\_

Primary Owner: \_\_\_\_\_

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

City: \_\_\_\_\_

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

**Please send the remaining balance to** (check one):

**MY NEW ACCOUNT**

Financial Institution: **Pasadena Federal Credit Union**

Routing # : **322280728**

Account #: \_\_\_\_\_

**MY ADDRESS LISTED ABOVE**

Primary Owner Signature \_\_\_\_\_ Date \_\_\_\_\_

Joint Owner Signature \_\_\_\_\_ Date \_\_\_\_\_