



SWITCH KIT...making the switch to LFCU.

Why switch to Latah Federal Credit Union?

We offer a variety of financial products and services that will make your busy life, so much easier! We offer low rate Auto, Boat, RV, ATV, Motorcycle, Mortgage and Home Equity Loans. We also have accounts that yield great rates, such as our Savings, Certificates, IRAs and Everyday Super Share.

You will stay in touch with your account with our easy Online Internet Banking, along with our Mobile Banking Access. You can even access your account with our ATM locations in Deary, ID, Walgreens in Moscow, Post Falls, Lewiston and Coeur D'Alene and every 28,000 CO-OP sponsored ATM locations!

We will make your switch from your old institution easy, and help you along the way. Make the switch to LFCU today, and we will take care of you!

Each form in the Switch Kit Booklet will assist you in making the switch. Simply fill out the forms and bring them into your local Latah Federal Credit Union Branch, and we will do the rest! A checklist is included to assist you with the closing of your existing account.

Direct Deposit Request Form – This form will be used to send a written notice to companies with which you have direct deposit (employer, government deposits, pension, investment dividends, child support or court issued deposits, etc.) This will notify the companies you want to switch your direct deposits to your new LFCU account.

Automatic Payment Request Form – This form will be used to send a written notice to companies who automatically take payments from your checking account (utilities, mortgage, insurance, brokerage, credit cards, internet service providers, child support, transfers from other financial institutions or court issued payments, etc.) This will notify the companies you want to switch your automatic payments to your new LFCU account.

Accounts Closure Request Form – This form will be used to send a written notice to your old financial institution informing them that you are closing your account and transferring the funds to your new LFCU account. This form will be filled out and sent to your old financial institution once you verify that all outstanding payments and deposits have cleared your account.

Accounts Closure Check List – Before closing your account at your old financial institution, review the check list to make sure items have been completed.



DIRECT DEPOSIT REQUEST FORM

Company Name:

Company Address:

City:

State:

Zip:

Company Phone:

Company Fax:

Name of Member:

SSN:

Address:

City:

State:

Zip:

Home Phone:

Work Phone:

To Whom It May Concern:

Please discontinue sending my automatic direct deposit to Account Number:

And/or Account Number:

with

As of

(date), please start making this automatic deposit into my account at:

Latah Federal Credit Union

Account Number:

Account Type: **Checking**

Savings

Routing Number: 323173368

If you have any questions about this request, please contact me at:

Signature: _____

Date: _____



AUTOMATIC PAYMENT REQUEST FORM

Payee Name:

Payee Address: City: State: Zip:

Payee Phone: Payee Fax:

Account Holder Name: Account Number:

Address: City: State: Zip:

Home Phone: Work Phone:

To Whom It May Concern:

You are currently withdrawing for my from:

Financial Institution Name:

Routing Number of Institution:

Account Number:

As of ,please start taking this automatic payment from my account at:

Latah Federal Credit Union

Account Number:

Account Type: Checking Savings

Routing Number: 323173368

If you have any questions about this request, please contact me at:

Signature: _____ Date: _____



ACCOUNTS CLOSURE FORM

Bank/other Financial Institution Name:

Address:

Phone Number:

| | | | |
|------------------------|-----------------------------------|----------------------------------|--------------------------------|
| Account Number: | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Other |
| Account Number: | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Other |
| Account Number: | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Other |
| Account Number: | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings | <input type="checkbox"/> Other |

To Whom It May Concern:

Please accept this letter as authorization to close my account(s) listed above, at your institution and send a check for the remaining balance to **Latah Federal Credit Union** to the address listed below.

If you have questions please contact me at:

I understand that I will need to verify that all outstanding payments and deposits have cleared before the account is closed. I have already made arrangements to switch any automatic debits and deposits I have associated with this account(s).

Thank you,

| | | |
|-----------------|--------------|-------|
| _____ | _____ | _____ |
| Owner Signature | Printed Name | Date |

| | | |
|-----------------------|--------------|-------|
| _____ | _____ | _____ |
| Joint Owner Signature | Printed Name | Date |

Mail to: Latah Federal Credit Union Attention:



ACCOUNTS CLOSURE CHECK LIST

- Stop using your previous checking account. Make sure to leave enough cash in the old account to cover any outstanding checks and other scheduled payments.
- All checks have cleared the account.
- All automatic withdrawals have been switched to Latah Federal Credit Union. An Automatic Payment Request Form needs to be completed for each company where you have an automatic withdrawal.
- All direct deposits or payroll deductions have been switched to Latah Federal Credit Union. A Direct Deposit Request Form needs to be completed for each company where you have a direct deposit.
- Destroy all remaining checks. Or bring in your checks from your previous financial institution and we will shred them for you.
- Shred or return debit cards, check cards or ATM cards to your previous financial institution.
- Don't want to keep your loan at your old financial institution? Apply with LFCU.
- Start enjoying all the benefits of membership at Latah Federal Credit Union!

**That is it! You will have successfully switched your account to
Latah Federal Credit Union!**