

## ACCOUNT SWITCH KIT

We make it easy to switch your current accounts to our credit union. Just complete the attached forms and follow the steps listed below. It's that easy!

Visit our branch to open your new personal savings (membership) and checking account. Be sure to ask about our other convenient services (VISA debit/ATM card, overdraft protection, online banking and electronic statements).

**1**

### **Submit an AUTHORIZATION TO CHANGE MY DIRECT DEPOSIT Form\***

Give this coupon to your employer's payroll manager to have your regular payments electronically deposited into your OTSECU account. If you have Social Security benefits, visit our branch and we'll help you fill out the federal form to move your direct deposit.

**2**

### **Submit an AUTHORIZATION TO CLOSE MY ACCOUNT Form\***

If you're banking with financial institutions other than OTSECU, it's a good idea to close out those old checking accounts once all the checks have cleared and move the money to your OTSECU account. Simply fill out this coupon and mail or give it to your old bank to instruct them to close your account and send you your remaining balance.

**3**

### **Submit an AUTHORIZATION TO CHANGE MY AUTOMATIC PAYMENT Form\***

If you have any payments automatically deducted from your OTSEFCU account, please complete this form and give it to the company or creditor you are paying and they will begin taking the payment out of your OTSECU account.

Questions?

Contact us at 847-8560  
or visit our branch.

\* Note: Some employees, businesses or institutions may have additional requirements to process your request.



# AUTHORIZATION TO CHANGE MY DIRECT DEPOSIT

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
Employer \_\_\_\_\_  
\_\_\_\_\_  
Soc. Sec. Number \_\_\_\_\_

Please redirect my direct deposit to my account  
with OTS Employees CU as follows:

Bank Routing Number: **321379148**

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

Account Type:

Checking

Savings



I hereby authorize to have my direct deposit switched to my account with OTS Employees CU.

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

MKT-FM-313-2020-03



This credit union is federally insured by the National Credit Union Administration.

# AUTHORIZATION TO CLOSE MY ACCOUNT

To: \_\_\_\_\_  
*Name of previous financial institution*  
Account No: \_\_\_\_\_  
*Previous Account Number*

Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

This letter serves as authorization to close my account.  
Please send me a check for the remaining balance to the  
address shown at right.

Signature \_\_\_\_\_  
Print Name \_\_\_\_\_  
Co-Signer Signature \_\_\_\_\_  
Print Co-Signer's Name \_\_\_\_\_

Date \_\_\_\_\_

Date \_\_\_\_\_



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# AUTHORIZATION TO CHANGE MY AUTOMATIC PAYMENT

Effective \_\_\_/\_\_\_/\_\_\_, I hereby authorize to change  
my automatic payments to the company listed below to  
come from my account with OTS Employees CU.

Pay to: \_\_\_\_\_  
*Company to be paid by automatic payment*

Account/Policy No: \_\_\_\_\_

Please update my payment information to my account  
with OTS Employees CU as follows:

Bank Routing Number: **321379148**

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

Account Type:

Checking

Savings



Name \_\_\_\_\_  
Address \_\_\_\_\_  
\_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

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