

Switch

← →
your checking account with ease.



Make your transition as smooth as possible with this handy guide outlining the few simple steps it takes to make the great switch to a PFCCU checking account. Once you have opened your PFCCU checking account, then fill out the forms on the following pages and send them to the appropriate parties. We have also included a convenient checklist to help you through the switch.



STEP ONE

Direct Deposit Change Form

Submit this form to your human resource or payroll office.

To Whom It May Concern:

Please redirect my direct deposit per my instructions to the financial institution listed below:

I authorize my direct deposit to be routed to:

Postal Federal Community Credit Union
1983 E. Seminole
Springfield, MO 65804
Routing # 286582805

Member# _____ Checking Savings

(new members use your SSN)

Employee Name _____

Street Address _____

City _____ State _____ Zip _____

Social Security # or Employee ID _____

Previous Financial Institution _____

Acct. # _____

Employee _____

Signature _____ Date _____



STEP TWO

Automatic Payment Change Form

Submit this form to the company or payee receiving automatic payments.

To Whom It May Concern at : _____
(Merchant/Payee Name)

Please route my automatic payment per my instructions to the financial institution listed below:

Name _____
Street Address _____
City _____ State _____ Zip _____
Acct. # _____

I authorize my automatic payment to be debited:

Monthly Weekly

Effective: Immediately Beginning: _____
(Date)

From my account at:
Postal Federal Community Credit Union
1983 E. Seminole
Springfield, MO 65804
Routing # 286582805

Member# _____ Checking Savings
(new members use your SSN)

Signature _____ Date _____

You should complete one change form for every automatic payment merchant for which you have scheduled e-debits from your previous account. Please make additional copies from this form as needed.



STEP THREE

Checking Account Closure Form

Submit this form to your old financial institution.

To Whom It May Concern at : _____
(Previous Financial Institution)

Please close my account as instructed here and forward the remaining balance from the account, including any interest accrued (if applicable), to the financial institution shown below:

Name(s) on the Account _____
Street Address _____
City _____ State _____ Zip _____
Checking Account Number to be closed: _____

I authorize the closure of my account effective as of this date: _____

Please transfer the remaining balance to:
Postal Federal Community Credit Union
1983 E. Seminole
Springfield, MO 65804
Routing # 286582805

Member# _____ Checking Savings
(new members use your SSN)

Primary Account Owner's Signature _____ Date _____

Joint Account Owner's Signature _____ Date _____



CHECKLIST

Did You Remember Everything?

Check off the items on this list as you make your switch. By the time you get to the end, your checking account will be moved quickly and easily.

- Join the credit union (if you're not a member already) and open the PFCCU checking account of your choice.
- Make sure all checks have cleared your old checking account.
- Leave enough funds in your old checking account to cover any outstanding debits.
- Send the "Step One" form to your Human Resources or Payroll Department
- Send the "Step Two" form(s) to merchants who take automatic payments from your checking account.
- Once you are certain all direct deposits and automatic payments have moved to your new account, send the "Step Three" form to your old bank to close out your checking account.

Here's a quick reminder list of possible direct deposits and automatic payments made to and from your account:

Direct Deposits

- Payroll
- Social Security (*contact us for the proper form*)
- Government (*contact us for the proper form*)

Automatic Payments

- Mortgage
- Investments
- Loans
- Electricity
- Telephone
- Cable
- Internet
- Charities
- Credit Cards

Congratulations, and thank you for making the switch to a great PFCCU checking account!

