



# **ACCOUNT SWITCH KIT**

## IMPORTANT INFORMATION

Most companies will allow you to use the attached **Account Switch** form to make the necessary changes. Others will allow changes to be made by phone or online, while some may require the use their own forms.

CCU can submit the changes to Social Security Administration for you.

You may need to contact your employer concerning payroll direct deposit changes. More than likely, you will need to complete their forms for the change to take place.

Online Billpay is **NOT** a Preauthorized Transfer. Only a company that is automatically drafting the payment from your account will need to be contacted.

If you are currently using Online Billpay thru your current financial institution, you will need to cancel your old bill pay and setup Online Billpay with CCU. CCU staff members will be glad to assist you.

# SWITCH KIT

Thank you for choosing Consumer Credit Union for your new checking account. Our goal is to make your switch to CCU convenient and simple. CCU's *Switch Kit* will provide you with one easy to use form that will handle your current pre-authorized payments and direct deposits.

There are only **FOUR** steps to this process and it's easy to do!

- 1) **Open your new account at CCU.** Stop by any CCU location and be sure to bring a valid form of identification. Our friendly staff will assist you in this quick and effortless process.
- 2) **Stop using your account at the financial institution you are switching from.** It is a good idea to leave the account open for approximately four weeks. This will give enough time for your direct deposits and automatic payments to switch successfully and for all of your previously written checks to clear.
- 3) **Use the Switch Form and Contact List to transfer all of your automatic deposits and automatic withdrawals to your new CCU account.** Our CCU staff will be glad to help you prepare the forms and will provide you with many of the phone numbers you are going to need to make the switch.
- 4) **Close the account at your previous financial institution.** Make sure to wait until you are sure that all of the payments and deposits have been successfully transferred and all of your checks have cleared.

**You're Finished!**

It's that simple! And don't forget, we are there to help you if assistance is needed. The attached forms will help you in making your **Switch a Success!!**

# ACCOUNT SWITCH FORM

Date: \_\_\_\_\_

To: \_\_\_\_\_ (Depositing or Billing Company)

\_\_\_\_\_ (Address of Company)

\_\_\_\_\_ (City, State, Zip)

From: \_\_\_\_\_ (Your Name)

\_\_\_\_\_ (Home Address)

\_\_\_\_\_ (City, State, Zip)

**Please accept this letter as authorization to change the existing:**

Automated Payment

Regular Deposit

In the name of \_\_\_\_\_, account number \_\_\_\_\_  
to a newly established account at Consumer Credit Union.

Effective \_\_\_\_\_ as soon as possible or \_\_\_\_\_ beginning on \_\_\_\_ / \_\_\_\_ / \_\_\_\_.

My new account information is as follows:

Consumer Credit Union Routing Number: **264279091**

Consumer Credit Union Account Number: \_\_\_\_\_

Checking                  Savings

If you have any questions, please contact me by phone at \_\_\_\_\_.

Thank you for your help with this matter.

Sincerely,

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

# TRANSACTION CHECKLIST

Pre-Authorized Payment	Account Number	Amount	Date Contacted	Contact Person	Date Completed
Mortgage					
Auto Loan					
Auto Loan					
Credit Card					
Credit Card					
Credit Card					
Electricity					
Gas/Oil					
Water					
Cable					
Home Phone					
Cell Phone					
Internet					
Home Insurance					
Auto Insurance					
Life Insurance					
Other Insurance					
Day Care					
Health Club					
Investment					
Investment					
Investment					
Newspaper					
Other					
KEEP THIS TRANSFER CHECKLIST FOR YOUR RECORDS !					



# CONTACT LIST

<b>BRISTOL</b>		
Bristol TN. Essential Services	423-968-1526	
Atmos Energy	800-538-3778	
Bristol Water Department	423-989-5649	
Embarq	423-968-8121	
Comcast	800-464-9739	
Charter	888-829-3018	
Bristol Herald Courier	276-669-2181	
<b>KINGSPORT</b>		
Appalachian Power	800-967-4237	
Atmos energy	888-286-6700	Changes made by phone
City of Kingsport Water Dept.	423-229-9416	
Embarq	423-246-3121	
Charter	888-829-3018	Use <a href="http://www.charter.com">www.charter.com</a> to make changes
Kingsport Times-News	423-246-8121	