

# Switch Kit – "To Do" List

We'll help you switch all your accounts to Park City Credit Union, right here - right now! Simply use this handy "To Do" list to help you make the switch – and remember the online bill pay option!

- 1) Always have handy these 2 important numbers for making the switch:

Routing Number: 291580614

Account Number: \_\_\_\_\_ (Note: The last 2 digits differentiate checking, savings, etc. If you have multiple accounts the digits prior to the last 2 will be the same.)

- 2) Switch direct deposits coming in to your account. Contact "Payroll" of the depositing company to find out how they prefer this change to be made. If a written notice other than their own form is required, the "Authorization to Change Direct Deposit" will provide the necessary information. Deposits to switch may include:

- |   |  |
|---|--|
| <input type="checkbox"/> Employer deposit               | <input type="checkbox"/> Brokerage deposits                      |
| <input type="checkbox"/> Government deposit             | <input type="checkbox"/> Child support or court-ordered deposits |
| <input type="checkbox"/> Social Security Administration | <input type="checkbox"/> Other _____                             |

- 3) Switch automatic payments going from your account using the "Authorization to Change Automatic Withdrawal" form. (Some companies may require their own forms, but this notification will prompt them to provide that.) For this step, you may want to consider changing to online bill-pay instead of automatic withdrawal. With online bill-pay, it's easy for you to change the date and amount of every payment. Here are some common auto-withdrawals to change:

- |   |   |
|---|---|
| <input type="checkbox"/> Rent/Mortgage (consider a Re-Fi) | <input type="checkbox"/> Internet Service                         |
| <input type="checkbox"/> Auto (consider refinancing)      | <input type="checkbox"/> Credit Cards (Consolidate and save)      |
| <input type="checkbox"/> Utilities: Electric, Gas, Water  | <input type="checkbox"/> Club/Membership Dues                     |
| <input type="checkbox"/> Landline Telephone               | <input type="checkbox"/> Investments (Ask about PCCU Investments) |
| <input type="checkbox"/> Wireless Telephone               | <input type="checkbox"/> Association fees                         |
| <input type="checkbox"/> Cable/Satellite TV               | <input type="checkbox"/> Other _____                              |

- 4) Close old checking, savings, and bill-pay accounts using form entitled, "Please Close My Account." Check institution(s) off your list as they are notified. (Be sure checks have cleared.)

\_\_\_\_\_  \_\_\_\_\_

We'll be glad to help you make the switch. If you have any questions, feel free to stop in, chat online at [www.parkcitycu.org](http://www.parkcitycu.org), or call us at any branch, and press "0" for a Member Service Specialist. When you do, ask about refinance opportunities, or home equity loans, as well.



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MERRILL TOMAHAWK MINOCQUA RHINELANDER  
715-536-8351 [parkcitycu.org](http://parkcitycu.org)

# Authorization to Change Direct Deposit

Instructions: Fill in, print, sign, then fax or mail one of these forms to each company that is currently making direct deposits to your old account.

## To:

Name of company that makes direct deposit: \_\_\_\_\_

ATTENTION: PAYROLL

Regarding employee/agent/member number: \_\_\_\_\_

IMPORTANT: I have opened a new account at Park City Credit Union. Please direct my

Existing Direct Deposit       New Direct Deposit

to my new Park City Credit Union account. My account number is: \_\_\_\_\_

The type of account is:     Checking       Savings

The Park City Credit Union routing number is: 291580614

## From:

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

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

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

Phone Number: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

If you are unable to accept this form, please mail your authorized form to me at the above address. If you have any questions about this request, please contact me at the above phone number.



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# Authorization to Change Automatic Withdrawal

Instructions: Fill in, print, sign, and fax or mail one of these forms to each company that is currently making automatic withdrawals from your old account.

Today's Date: \_\_\_\_\_

Name of company that makes automatic withdrawal: \_\_\_\_\_

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ Fax: \_\_\_\_\_

To whom it may concern:

You are currently withdrawing: \$ \_\_\_\_\_ (amount) on a (how often) \_\_\_\_\_ basis  
for my \_\_\_\_\_ (what payment is for) from: \_\_\_\_\_

Old Financial Institution: \_\_\_\_\_

Routing Number: \_\_\_\_\_

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

or

Card Number: \_\_\_\_\_

Please DISCONTINUE withdrawals from the above account and (check one)

Begin withdrawals from my account at

Park City Credit Union

300 East 2nd Steet

Merrill, WI 54452

Routing Number: 291580614

Account Number: \_\_\_\_\_ Savings \_\_\_\_\_ or Checking \_\_\_\_\_

Note that I will use Park City Credit Union's Bill Pay Service to make future payments.

If you have any questions about this request, please contact me at this phone number: \_\_\_\_\_

Thank you,

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

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

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

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



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# Please Close My Account

\_\_\_\_\_  
Today's Date

\_\_\_\_\_  
Financial Institution where account is to be closed

\_\_\_\_\_  
Address

\_\_\_\_\_  
Fax Number

\_\_\_\_\_  
City, State Zip

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

Effective \_\_\_\_\_ please close the above listed account(s) and send a check, payable to the account holder listed below, for the remaining balance to:

Park City Credit Union  
Attn: Member Service Center  
300 East 2nd Street  
Merrill, WI 54452

Please reference my Park City Credit Union account number, \_\_\_\_\_ on the check.  
If you have any questions regarding this request, please call me at the phone number below.

Thank you,

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

\_\_\_\_\_  
Name (print or type)

\_\_\_\_\_  
Address

\_\_\_\_\_  
Date

\_\_\_\_\_  
City, State Zip

\_\_\_\_\_  
Daytime Phone



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