



Member Switch Kit

Welcome to Southern Credit Union!

We are committed to you, our member! We want to make your experience with us an enjoyable one, so we try to keep things as simple as possible, and help out with unnecessary worries. Here you will find a Member Switch Kit that will help you make an easy transition from your previous financial institution to Southern Credit Union. We are excited that you have chosen to be a part of our family!

Here are the steps to make your transitions smooth:

1. **Direct Deposit Enrollment Form** - After you open your account and receive your account number from Southern CU, you can change your Direct Deposit. Simply fill out the Direct Deposit Enrollment Form and turn in to your employer's payroll department. This form will have everything you need for a smooth change-over.
2. **Automatic Payment Change Form** – Still have automatic debits coming out of your old account? This form will help you get it changed to your new Southern CU checking account. Simply fill out and submit the Automatic Payment Change Form to the merchants and service providers with which you have automatic payments charged from your account. This may include: Mortgages, Gym Memberships, Loans, Insurance, Internet, Gas, Cable, Phone, Electric, Water, Court Issued Payments, etc. We have also included a helpful checklist for you to track the status of the automatic payments and debits affecting your account.
3. **Authorization to Close Account** - Complete and submit this form to your previous financial institution. This will instruct them to transfer any remaining balances to your Southern Credit Union Account.

If you have questions regarding your account, please contact us toll free at 800-305-5579. Visit our main office at 508 National Avenue, Chattanooga, TN 37404 or visit our website at www.southerncu.com to learn more about our products and services.

Thank you for choosing Southern Credit Union!



Direct Deposit Request

Complete and sign this form for every party (i.e. employer, vendor) initiating a direct deposit to your account. Then, give this signed form, along with a voided check from your new Southern Credit Union account, to the party making the direct deposit.

Establish Direct Deposit Change my Existing Direct Deposit

Employee Name _____

Employee Number _____

Name of Employer _____

Employer Address _____

Southern Credit Union

508 National Ave., Chattanooga, TN 37404

Southern Credit Union Routing Number: **261388888**

Southern Credit Union Checking Account Number: _____ (or)

Southern Credit Union Savings Account Number: _____

Payroll Number _____ Effective/Start Date _____

| | | | |
|------------------------------------|---------------|-------------------|------------------------------------|
| <input type="checkbox"/> Checking | [ACCT#] _____ | [AMOUNT] \$ _____ | <input type="checkbox"/> Weekly |
| <input type="checkbox"/> Savings | [ACCT#] _____ | [AMOUNT] \$ _____ | <input type="checkbox"/> Bi-Weekly |
| <input type="checkbox"/> Net Check | | | <input type="checkbox"/> Monthly |

I hereby authorize and request the employer named above to deposit the amounts indicated to Southern Credit Union for each payroll period beginning on the effective/start date indicated above and until further notice from me. If this is a change in a previous authorization, I instruct my employer to cancel my previous authorization and to follow this authorization.

Member Signature _____ Date _____



Automatic Payment Change Form

(Give this to Company/Payee)

Please route this automatic payment per my instruction:

Company to receive payment _____ Account Number _____

Company address _____

City _____ State _____ Zip _____

Previous financial Institution _____ Account Number _____

Payment Amount \$ _____

Monthly

Bi-Weekly

Weekly

I authorize my automatic payment to be debited from my Southern Credit Union account

Effective ____ / ____ / ____

Southern Credit Union routing number: **261388888**

Account Number _____

Savings

Checking

Authorized Signature(s) _____ Date _____

Authorized Signature(s) _____ Date _____



Switch Kit Helpful Checklist

Use this form to be sure you've accounted for all payments and debits affecting your account.

| | Company/Financial Institutional | Account Number | Type of Account | Date Contacted | Follow-Up Date | Date Completed |
|---------------------|---------------------------------|----------------|-----------------|----------------|----------------|----------------|
| Direct Deposit | | | | | | |
| Direct Deposit | | | | | | |
| Mortgage | | | | | | |
| Auto Loan | | | | | | |
| Auto/Home Insurance | | | | | | |
| Gas/electric | | | | | | |
| Other | | | | | | |
| Other | | | | | | |

NOTES:



Authorization to Close Account

Transfer Account Funds From

Other Financial Institution Name _____

Account Number _____

Address _____

City/State/Zip _____ Phone _____

I am transferring my account(s) to Southern Credit Union. This written notice is my authorization to close my account at your institution. I understand that I will need to make certain all checks, drafts, and automatic debits have cleared before completely closing my account(s). I understand that it is my responsibility to switch any automatic debits and deposits that I have.

Instructions to Transferring Institution (check all that apply)

- Transfer all funds and close my account
- Transfer exactly \$ _____
- Transfer funds immediately
- Transfer funds on the following date: _____
- Other: _____

Please accept this letter as my authorization to transfer funds from the above named account to:

Southern Credit Union

508 National Avenue, Chattanooga, TN 37404

Southern Credit Union Routing Number: **261388888**

Southern Credit Union Account Information: Owner Name _____

Joint Owner _____

Please send a check made payable to Southern Credit Union and note on the check that it is for deposit to my Southern Account # _____ Account Type: Checking Savings

Owner Signature _____ Date _____

Joint Owner Signature _____ Date _____