

# Make the Switch

(It's easy as 1-2-3)

A REALTORS® Federal Credit Union eChecking account has no monthly fee and is great for busy real estate professionals! Deposit checks with your scanner, set up bills to be paid automatically and have money transferred and set aside for your annual dues. Follow these easy steps to switch to a REALTORS® FCU eChecking account today—you'll be glad you did!

## 1 Open your new REALTORS® FCU eChecking account:

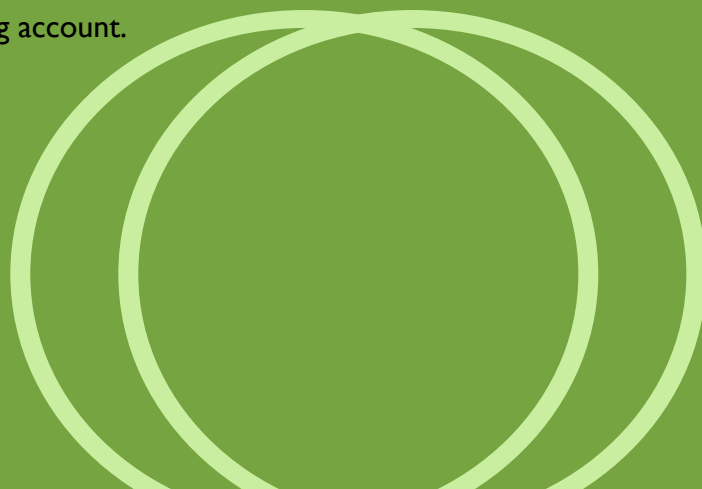
- Login to Online Banking and click on the “Accounts Tab”, then “Open New Account”. If you are using Online Banking for the first time, click “Enroll”.
- Follow the instructions to open an eChecking account
- Need help? Call 866.295.6038 any time, any day

## 2 Switch your Direct Deposit(s), Automatic Transaction(s), & Bill Payees:

- Direct Deposit: Ask your employer for a new Direct Deposit form fill in your REALTORS® FCU account information, and turn it back in to them.
- Automatic Withdrawal: Use our *Automatic Withdrawal Authorization Form*, or contact the companies individually. There is usually a way to do this through their online system.
- Bill Pay: Once you open your eChecking account you'll be able to set up Bill Pay, and switch over your payees.

## 3 Close your old account:

- Use our *Account Closure Authorization Form* to authorize the closure of your old account. Make sure all of your automatic transactions have been switched to your new account and that any outstanding checks have cleared. Have your remaining balance sent over to your new REALTORS® FCU eChecking account.





## Automatic Withdrawal Authorization

*You may complete and send this form to the companies you have authorized automatic payments for (ie: mortgage, insurance, membership fees, utility bills, etc.). Contact any companies directly to authorize automatic payments using your REALTORS® FCU debit card.*

### To Whom It May Concern:

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone:

### Please discontinue my automatic withdrawal from the following account:

OLD FINANCIAL INSTITUTION:

ABA/Routing Number:

Account Number:

### Please make all future automatic withdrawals from the following account:

Financial Institution: REALTORS® Federal Credit Union

ABA/Routing Number: 055080431

Account Number:

**Thank you and please contact me with any questions you have about this request.**

Signature:  Date:

Name:

Address:

City, State, Zip:

Phone Number:

**DO NOT RETURN THIS FORM TO REALTORS® FEDERAL CREDIT UNION**



## Account Closure Authorization

*This form can be used to authorize the closure of your account at your previous financial institution. Be sure that any outstanding items have been cleared and your direct deposits and automatic transfers have been switched over to your new account.*

### To Whom It May Concern:

Financial Institution:

Address:

City, State, Zip:

### Please close my account:

Account Number:

Primary Owner:

Address:

City, State, Zip:

### Please send the remaining balance to: *(Place an "x" next to the desired option)*

Please deposit directly to my new account at REALTORS® Federal Credit Union

Account Number:  ABA/Routing Number: 055080431

Please forward me a check to my address listed below.

### If you have any questions, please contact me at the number below. Thank you.

Primary Signature:  Date:

Joint Signature:  Date:

Name:

Address:

City, State, Zip:

Phone Number:

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