



Now that you've opened your new Cartwheel Checking Account(s), you can switch everything over from your old account(s) in just three steps using our "Make the Switch" Kit. This PDF contains all the forms you need to complete the following steps:

Step 1: Direct Deposit

If you had Direct Deposit to your old account, you can continue to do this with your Verity account. Simply complete the Direct Deposit Switch form and give it to your employer.

Step 2: Automatic Payment

Any payments that were automatically deducted from your old account can be easily switched to your Verity account. Fill out the Direct Payment Switch Form and send it to each company that makes an automatic deduction. We've included a Checklist in this Switch Kit to help you keep track of your progress.

Step 3: Close your old account

To close your old account(s), simply fill out the Account Closing Form and mail it to your former financial institution.

If you have any questions, please call Verity's Member Service Center at (800) 444-4589 or (206) 440-9000.



MAKE THE SWITCH CHECKLIST

Welcome to Verity Credit Union! As you switch your direct deposits and automatic payments to your new Verity account, use the checklist below to track your progress.

Your Verity Checking Account Information:

Account Number: _____ (7 digits only)

Routing & Transit Number: 325081885

Switch your Direct Deposits/Automatic Payments to your new Verity Checking Account.

1. Determine the companies that automatically deposit into/withdraw from your previous checking account.
2. Notify those companies of your new checking account information. You can usually notify them by phone, company website or email. You can use our Automatic Deposit/Payment Form to update your checking account information.
3. Now is a great time to set-up new Direct Deposit and Automatic Payments.

Direct Deposit/ Automatic Payment Checklist

	COMPANY	PHONE	ACCOUNT NBR	NOTES	SWITCHED
Direct Deposits					
Employer					
Employer					
Retirement/Pension					
Social Security Admin.		800-772-1213			
Automatic Payments					
Auto Insurance					
Brokerage Account					
Cable/Satellite					
Cell Phone					
Credit Card					
Electric					
Gas					
Gym Membership					
Home Phone					
Life Insurance					
Loan					
Mortgage					
Trash					
Water/Sewer					



DIRECT PAYMENT CHANGE FORM

Send this to the company making the automatic debit from your account. They may require you to complete additional forms.

To:**From:**

Company Receiving Direct Payment

Member Name

Company Address

Member Address

City State Zip

City State Zip

Direct Payment Account Number

To Whom It May Concern:

Please redirect my Direct Payment for the above account number to my Verity Credit Union account as instructed below.

Account Type:

Checking Savings

Effective:

Immediately Date to Begin: _____

My Verity Credit Union Account Information:

Account Number

325081885

Routing Number

If you have any questions about this request, please contact me at the following number:

Phone Number

Day Evening

Signature

Date



ACCOUNT CLOSING FORM

Give or send this form to your former financial institution. They may require you to complete additional forms.

To:

Financial Institution Name

Financial Institution Address

City State Zip

From:

Member's Name(s)

Member Address

City State Zip

To Whom It May Concern:

Please close the account(s) listed below effective immediately, and send a check for the remaining balance to my address above.

I understand that all checks, automatic payments and other transactions need to have cleared before completely closing my account(s). I have made arrangements to switch my automatic Direct Deposits and Payments.

Name on Account

Joint Name on Account

Account Number

Type of Account

Account Number

Type of Account

Account Number

Type of Account

Thank you for your prompt attention to this matter.

Member Signature

Joint Signature

Member Name (Print)

Joint Name (Print)

Date

Date