

3 easy steps

To switch from your current bank to The Union Credit Union.

- 1 Fill out this form.
- 2 Return it to The Union Credit Union. We do the rest!
- 3 Shred your old checkbooks to prevent identity theft.

If you have any questions?

Call: (509) 328-5213

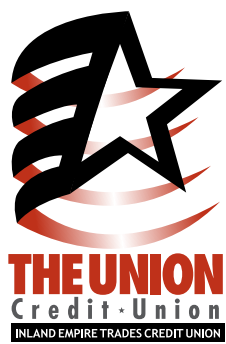
Visit: www.TheUnionCreditUnion.com

Please deliver this completed form in person only to an authorized employee or representative of The Union Credit Union. **DO NOT MAIL.**

Switch Kit



The easy way to switch from your current bank to The Union Credit Union.



account information

Individual account

Joint account

Name

Name

Street address

Street address (if different)

City, State, Zip

City, State, Zip (if different)

Mailing address (if different)

Mailing address (if different)

Home phone

Home phone

Alternate phone (work, cell)

Alternate phone (work, cell)

Email address

Email address

Primary account holder

Secondary account holder

Social security number

Social security number

Driver's license #/Exp.

Driver's license #/Exp.

Date of birth

Date of birth

Mailing Address (if different)

Mailing Address (if different)

Employer

Employer

Position

Position

Union name

Union name

Signature

Signature

Date

Date

authorization for direct deposit

Please set up my direct deposit with **The Union Credit Union** (Inland Empire Trades Credit Union) as shown below:

1 Employer name _____ Phone _____

Previous bank name _____

Previous account number _____ Account type _____

2 Employer name _____ Phone _____

Previous bank name _____

Previous account number _____ Account type _____

automatic payment

Please transfer the following automatic payments to **The Union Credit Union** (Inland Empire Trades Credit Union)

1 Payee name _____ Phone _____

Payee account number _____

Previous payment account number _____ Account type _____

2 Payee name _____ Phone _____

Payee account number _____

Previous payment account number _____ Account type _____

3 Payee name _____ Phone _____

Payee account number _____

Previous payment account number _____ Account type _____

letter of transfer authorization

Please fill out and sign the following to authorize **The Union Credit Union** to transfer your accounts. Signatures may require notarization.

I/we, _____

(print names of all parties on accounts), hereby authorize the transfer of the following assets:

Account type _____ Account number _____

Account type _____ Account number _____

Current institution _____
to The Union Credit Union (IETCU) account number _____

Signature _____ Date _____

Signature _____ Date _____

remember

- Some banks may require their own forms be used to switch accounts.
- Additional information may be required to complete the switch to **The Union Credit Union**.
- Federal law requires all financial institutions obtain, verify and record information to identify each account holder.

what types of accounts are you interested in?

- | | |
|---|---|
| <input type="checkbox"/> Checking | <input type="checkbox"/> Debit card |
| <input type="checkbox"/> Savings | <input type="checkbox"/> Line of credit |
| <input type="checkbox"/> Certificates of Deposit (CD) | <input type="checkbox"/> Mortgage/home loan |
| <input type="checkbox"/> Credit card | <input type="checkbox"/> Auto loan |
| | <input type="checkbox"/> Online banking |

To apply for a loan, please call (509) 328-5213.