

Make The Switch To Elliott Federal Credit Union

The Switch Kit from Elliott Federal Credit Union makes it easy to get the better service you deserve.

The Switch Kit is designed for busy people like you who want to switch their accounts to

Elliott Federal Credit Union, but don't want to hassle with opening and closing accounts. All you need to do is give us a little information and we'll do all the paperwork for you. You don't even have to come into the credit union for a switch kit. Just let us know you want to switch institutions and we'll send one to you *free in the mail!*

Making the switch is easy with our special Switch Kit

Elliott Federal Credit Union offers many products to meet your personal needs including a Personal checking account in which there will be **No Minimum Balance Fee. Free** online Banking and Bill Pay!

Switching to Elliott Federal Credit Union is easy. Here's how:

1. Fill out the information pages
2. Bring the completed sheets along with your Driver's license to the credit union
3. Copies of any direct deposit paperwork (i.e. payroll, social security, etc.)
4. Copies of any bills (i.e. car payment, phone bill, etc.).
5. A Elliott Federal Credit Union Representative will take care of the rest

It's So Easy!

Bring TWO Primary Forms of Identification (Photo Required)

- Driver's License
- Non-Driver's Identification
- US Government Identification Card
- Valid Passport
- Alien Identification Card

Important Information:

At the time of account opening we will prepare a signature card and provide account disclosures.

Some companies require the use of their own forms to initiate the switching of accounts for automatic debits or credits. In order to help facilitate this change from your existing account to your new Elliott Federal Credit Union account, we will ask you to provide your current banking information and any forms supplied to you by your employer or company originating the debit or credit. Please note: To allow time for outstanding checks, debit card purchases and automatic payments to clear, stop using your old account about 10 business days prior to closing.

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account we will ask your name, address, date of birth, and other information that allows us to identify you. We may also ask to see your driver's license or other identifying documents

Elliott Federal Credit Union

www.elliottfcu.com

Member NCUA

Account Information

___ Individual Account

___ Joint Account

Name

Name

Street Address
City, State, ZIP

Street Address
City, State, ZIP

Mailing Address (if different)

Mailing Address (if different)

Home Phone

Home Phone

Work Phone

Work Phone

Cell Phone (optional)

Cell Phone (optional)

Email Address (optional)

Email Address (optional)

Social Security Number

Social Security Number

Employer

Employer

Date of Birth

Date of Birth

Authorization to Change Automatic Payment

Please complete one for each company

*Some companies require the use of their own forms

Company Name: _____

I have recently changed financial institutions and would like to have my automatic payment with your company changed to my new account.

Please discontinue debiting my old account and begin taking automatic payments from my new Elliott Federal Credit Union account effective _____.

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

Signature

Date

Automatic Payment Information:

Name on account:

Account number(s) with your company: _____

Address:

City, State, Zip:

Phone Number: _____

My NEW Account Information:

Institution: **Elliott Federal Credit Union**: 920 North Fourth Street, Jeannette, PA 15644

Routing Number: 243381984

Account Number: _____

Checking _____ Savings _____

Account Closing Letter

Financial Institution Name: _____

This letter is to inform you that I wish to close my account(s) at your institution. Please close the following account(s) listed below effective _____.

_____ Mail a check for the remaining balance(s) to my address.

_____ I will be writing a check for the remaining balance(s).

_____ Wire * remaining balance(s) to my new ___checking ___savings account at:

Elliott FCU

920 North Fourth Street, Jeannette, PA 15644

724-527-2822

Routing Number: 243381984

Account Number: _____

- Note: Some Institutions require prior authorization to wire funds

Thank you for your prompt assistance in this matter.

Sincerely,

Signature

Date

Joint Signature (if applicable)

Date

Account Information:

Checking Account Number: _____

Savings Account Number: _____

Name(s) on Account: _____

Authorization to Change Direct Deposit

Please complete one for each company.

* Some companies require the use of their own forms.

Company Name: _____

I have recently changed financial institutions and would like to have my direct deposit with your company changed to my new account.

Please discontinue crediting my old account and begin making direct deposits into my new Elliott Federal Credit Union account effective _____.

If you have any questions regarding this request, please contact me by mail or call me at
at
the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

Signature

Date

Direct Deposit Information

Name: _____

Address: _____

City, State, Zip: _____

Phone: _____

My NEW Account Information

Elliott Federal Credit Union, 920 North Fourth Street
Jeannette, PA. 15644

Routing Number: 243381984

Account Number: _____

Checking ____ Savings ____