

MAKE THE SWITCH

it's easy.

Now you can switch your checking account to a Beach Municipal Federal Credit Union checking account quickly and easily! This Switch Kit gives you the step-by-step guides to help you open your new account, close your old so you can enjoy the benefits of Beach Municipal FCU checking.

Start with the checklist and our 5 easy-to-follow steps and you'll have your account switched in no time! If you have any questions about your account or any of our other products and services, please feel free to contact the Credit Union at 757.333.7787 or beachmunicipal.org.

CHECKLIST

Do you have automatic withdrawals from your checking account for the following expenses? Make as many copies of your "Automatic Withdrawal Change Form" as you need and send one to each company that handles recurring payments automatically.

- | | |
|---|---|
| <input type="checkbox"/> Mortgage | <input type="checkbox"/> Utilities |
| <input type="checkbox"/> Auto Loan(s) | <input type="checkbox"/> Cable TV |
| <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Internet Access |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Health Club Dues |
| <input type="checkbox"/> Car Insurance | <input type="checkbox"/> Telephone/Cell Phone |
| <input type="checkbox"/> Credit Card(s) | <input type="checkbox"/> Investments |

SWITCH KIT



757.333.7787 • beachmunicipal.org

FIVE *easy steps*

Follow these 5 steps, and you'll be on your way to flexible, affordable, and convenient checking. We have included the forms you need.

1. OPEN your Beach Municipal FCU account. Visit our Thalia or Marketplace Branches for a membership application. All you need is your driver's license (or any other non-expired government issued picture ID), your Social Security Card and \$6 to to open and maintain your account.

2. STOP using your old checking account. You will need to let all your outstanding checks clear before closing the account. This could take 10 days or more.

3. SWITCH your Direct Deposit. Send the "Direct Deposit Switch Form" to your employer, the Social Security Administration or your retirement plan administrator. You can make additional copies if necessary.

4. CHANGE any automatic withdrawals. The checklist will help you make sure you don't miss anything! To change your automatic deductions, use the "Automatic Withdrawal Change Form," making additional copies if necessary.

5. CLOSE your old account. When you have finished steps 1 through 4, simply submit the "Please Close My Account" form to your financial institution. If there is a balance, your money can be transferred to your new account.

SWITCH

Direct Deposit Switch Form

Send this form to your present employer, the company that processes your direct deposits, the Social Security Administration or any other organization that sends you recurring payments.

CHANGE NOTICE

Date: _____

Company Name: _____

Address: _____

City, State, Zip: _____

To whom it may concern:

Please change my direct deposit to:

Beach Municipal Federal Credit Union
4164 Virginia Beach Boulevard
Virginia Beach, VA 23452
757.333.7787

Routing Number: 251483256

Beach Municipal FCU

Member Account No.: _____

Account type: Checking Savings

Sincerely,

Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Telephone: _____

CHANGE

Automatic Withdrawal Change Form

Send this form and a voided check or deposit slip from your new Beach Municipal FCU checking account to the companies that automatically withdraw money from your account.

CHANGE NOTICE

Date: _____

To *(the company that makes automatic withdrawals)*:

Address: _____

City, State, Zip: _____

Regarding my Account No.: _____

You are currently debiting my account at *(financial institution)*:

Effective (mo/day/yr): _____

Please cancel the above transaction and begin debiting my account at: Beach Municipal Federal Credit Union

Routing Number: 251483256

Beach Municipal FCU

Member Account No.: _____

Withdrawal from: Checking Savings

I authorize this change.

Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Telephone: _____

CLOSE

Please Close My Account

Send this form to the financial institution that has your current savings/checking account.

Date: _____

Financial Institution: _____

Address: _____

City, State, Zip: _____

To whom it may concern:

Please close my account.

Account No.: _____

Send the remaining balance to:

Beach Municipal Federal Credit Union
4164 Virginia Beach Boulevard
Virginia Beach, VA 23452
757.333.7787

Sincerely,

Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Telephone: _____