

SWITCH KIT

Getting Started

**Make the switch to better banking.
It's easy as 1, 2, 3!**

Make the move to Michigan Coastal Credit Union in 3 simple steps with our easy switch kit. We look forward to welcoming you to the Michigan Coastal family!

1 Open your new Michigan Coastal account.

Open your Michigan Coastal Credit Union account today for a better banking experience. Take the first step with our information-gathering tool on the next page.

2 Switch your direct deposits & automatic withdrawals.

Use our user friendly forms in this kit to collect all the information you will need to move your automatic transactions to your new MCCU account.

3 Close your current account.

You are one step closer to making the switch! Just complete the provided form on page 4 to close your account(s) with your current institutions. Keep in mind any remaining account balance(s) can be transferred to your MCCU account(s).

SWITCH KIT

Direct Deposit Authorization

Please fill out the information on this form to collect everything you will need to move your Direct Deposit to your new Michigan Coastal Credit Union account. Complete it either online (then download & print) or manually, and bring it to our office.

Notification of Direct Deposit Authorization Change

Company or Employer: _____

Address: _____

City, State, ZIP: _____

Phone Number: _____

Employee ID: _____

(if applicable)

Effective immediately, please deposit the net amount of my check to my Michigan Coastal Credit Union account. I authorize (name of depositor) _____ to automatically deposit funds into the account below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked in writing.

Place an X next to your desired option.

Net amount to Michigan Coastal Credit Union
 Account # _____ Routing # 272483277

Net amount to Michigan Coastal Credit Union
 Account # _____ Routing # 272483277

Signature: _____ Date: _____

Name: _____

Address: _____

City, State, ZIP _____

Phone Number: _____



Direct Deposit Checklist

These are the most common direct deposits:

- _____ Payroll
- _____ investments
- _____ Retirement Plans
- _____ Social Security

SWITCH KIT

Automatic Withdrawal Authorization

Please fill out the information on this form to collect everything you will need to move your automatic withdrawals (ACHs) to your new Michigan Coastal Credit Union account. Complete it online (then download & print) or manually, and bring it to our office. Use this form to authorize a change to any automatic payment, deduction, or withdrawals from your account. Use one form for each automatic withdrawal.

Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, ZIP:

Phone Number:

Please cancel all automatic withdrawals from my previous institution:

Financial Institution:

Account # Routing #

Please make all future automatic withdrawals from my new institution:

Account # Routing #

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature: Date:

Name:

Address:

City, State, ZIP:

Phone Number:

Automatic Withdrawal Checklist:

These are some of the most commonly used automatic payments.

Home Mortgage

Auto Loans

Utilities

Insurance

Cable/Internet

Gym Memberships

Credit Cards

Investments

Subscriptions

Charity Donations

SWITCH KIT

Account Closure Authorization

Use this form to gather everything you'll need to close your current account, then have your funds moved to your new Michigan Coastal account. Complete it either online (then download and print) or manually, and bring it to your current institution to get started.

Upon closing your account at your former financial institution, be sure to verify that any outstanding transactions have cleared. Request that your remaining balance be automatically deposited to your new Michigan Coastal account OR paid to you by check.

Notification of Account Closure Authorization

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 your desired option.

Please deposit directly to my new account at Michigan Coastal Credit Union
Account # _____ Routing # 272483277

Please forward a check to my address listed below:

Primary Signature: _____ Date: _____

Joint signature: _____

Name: _____

Address: _____

City, State, ZIP: _____

Phone Number: _____

Congratulations!

Now that you've gathered all of the necessary information, you're ready to switch to a truly better banking experience. We look forward to showing you the local difference and personal touch.

Welcome to Michigan Coastal Credit Union!
We Borrow Together, Save Together,
We Are Family.