

It's Easy to Make the Switch to American First Credit Union!

Welcome to American First Credit Union! Switching your account(s) to AFCU is easy with our convenient Switch Kit. It contains forms you can use to change your direct deposits and automatic payments and close your account(s) at your previous financial institution.

Transition Tips

- Begin by opening your new AFCU account online or at a branch.
- Let your employer and anyone else who makes direct deposits into your account know that they should now be made to your AFCU account.
- Let all the companies or other entities that make automatic payments or withdrawals from your account know that they should now be debited from your AFCU account.
- Once all of your outstanding checks have cleared and your direct deposits and automatic payments or withdrawals have been stopped, close your account(s) at your previous financial institution.

If you have any questions or need assistance, please let us know. We'd be happy to help explain the process and guide you through the transition to AFCU. Just give us a call at (800) 290-1112 or visit any of our convenient branches. We are delighted that you have chosen to bank with us and look forward to serving you!



Federally Insured by NCUA



**American
First**
Credit Union



Your dream. Our pursuit.

Direct Deposit

Let your employer and anyone else who makes direct deposits into your account know that they should now be made to your AFCU account. Make as many copies of this form as you need and send one to any company or other entity that makes direct deposits to your account. Examples of direct deposit initiators might be your employer, if you have your payroll directly deposited; Social Security; other government benefits; pensions; etc.

PLEASE SUBMIT THIS FORM ALONG WITH A VOIDED AFCU CHECK TO YOUR EMPLOYER AND ANY OTHER ORGANIZATIONS INITIATING A DIRECT DEPOSIT INTO YOUR ACCOUNT.

Member Name (please print)

Phone Number

ID Number (Payroll or SSN)

Member Signature

Joint Member Signature (if applicable)

Effective _____ (date), start using my new American First Credit Union account for processing my payroll direct deposit. See the attached voided check.

Previous Financial Institution

Financial Institution Name

Address

City, State, Zip

Account Number

American First Credit Union Account Information

Routing Number 322275607

AFCU Account Number (12 digits)



Federally Insured by NCUA



Automatic Payments

Think carefully about all the businesses and others who debit payments or other transactions directly from your current account.

Look at your account statement and identify all the automatic debits and who makes them. You may have debits that automatically occur monthly, weekly, annually or at other intervals. All of these initiators will need to be notified of your new instructions. There may be more than you think. Some examples might be your mortgage payment, car payment, health club membership, or insurance payments. Also look at any pre-set payments you may have through your current financial institution's online bill pay service.

PLEASE SUBMIT THIS FORM TO ANY COMPANY THAT MAKES AUTOMATIC WITHDRAWALS FROM YOUR ACCOUNT. ATTACH A VOIDED CHECK FROM YOUR NEW AMERICAN FIRST ACCOUNT.

Company Making Withdrawal (payee)

Account Number with Payee

Frequency of Payment

(Complete one for each company.)

Effective _____ (date), I would like to change my payment instructions. Currently you are debiting my old financial institution at:

Former Financial Institution

Routing Number

Account Number

As of _____ (date), start debiting my new American First Credit Union account at:

Routing Number 322275607

AFCU Account Number (12 digits)

Member Signature

Date



Close Account

Now you'll want to make sure your instructions have been followed and the direct deposits and automatic payments/withdrawals are being made to or from your AFCU account.

If you like paying bills online, it's time to enroll in AFCU Online Bill Pay! And don't forget to check out AFCU Mobile – mobile banking that makes your life, and your banking, easier.

SEND THIS FORM TO YOUR PREVIOUS FINANCIAL INSTITUTION. ANY REMAINING BALANCE ON YOUR OLD CHECKING ACCOUNT WILL BE DEPOSITED INTO YOUR NEW AFCU CHECKING ACCOUNT.

Financial Institution Name

Address

City, State, Zip

Effective _____ (date), please close the following accounts:

Checking Account Number

Savings Account Number

I would like the balance and any interest earned sent to my new American First Credit Union account (noted below). Additionally, I have verified that all my outstanding checks have cleared, and all my previous direct deposits and automatic payments have been stopped.

Member Signature

Date

Member Signature
(if applicable)

Date

Name (please print)

Phone Number

AFCU Checking Account Number

Please mail balance to:

**American First Credit Union
Attn: Account Services
6 Pointe Drive Ste 400
Brea, CA 92821**

