



It's EASY to switch your checking account to:

**Beacon Community Credit Union**

Our goal is to make switching your accounts as quick and easy as possible.

### Step One: Gather Information

Review your account statements to identify all forms of automatic payments to and withdrawals from your former account. You may want to review several past statements as some companies may withdraw funds quarterly.

Have your account information on hand:

New Credit Union Name: **Beacon Community Credit Union**

New Routing Number: **283079298**

New Account Number: \_\_\_\_\_

Old Financial Institution Name: \_\_\_\_\_

Old Routing Number: \_\_\_\_\_

Old Account Number: \_\_\_\_\_

(The financial institution's routing number is the first 9 numbers printed on the bottom of your checks. If you don't have checks, contact your financial institution.)

## Step Two: Transfer Direct Deposits

Direct Deposit makes it possible for your paycheck, Social Security payments, and other checks to be deposited directly into your account(s). Direct deposit ensures your funds are available without making an extra trip into the Credit Union to deposit your checks.

Direct Deposit(s)

<input type="checkbox"/> Employer Deposit / Paycheck	<input type="checkbox"/> Social Security Benefits
<input type="checkbox"/> Government Checks / Tax Refund	<input type="checkbox"/> Child Support
<input type="checkbox"/> Pension Benefits	<input type="checkbox"/> Other: _____

Complete and mail the Direct Deposit Authorization form to each company or organization that deposits money into your account and notify them of your new account number(s).

For direct deposit of Social Security benefits, call the Social Security Administration at 1-800-772-1213. You will need to provide them with the routing and account numbers associated with your new Beacon Community Credit Union account.

Please note that many companies that make direct deposits to your account may require a voided check. To void a check, simply write VOID in large letters across the entire face of a blank check.



### Step Three: Change Automatic Withdrawals

Review past account statements and make a list of all the companies or organizations that are automatically deducting payments from your account. Contact the companies or organizations and notify them of your new Beacon Community Credit Union account.

___ Insurance	___ Investments	___ Internet Services
___ Mortgage/Rent	___ Auto Loans	___ Electric Bill
___ Telephone/Cell Phone		___ Credit Cards
___ Cable/Satellite	___ Gas Bill	___ Water Bill
___ Clubs/Associations		___ Other: _____

In many cases you can change your billing information online or by phone. To change automatic payments by mail, use the Authorization to Change Automatic Payment form.

### Step Four: Close Your Old Account

Once your last check, automatic withdrawal, and /or automatic payment has cleared, you are ready to close your old account and destroy all remaining checks, ATM/debit cards and deposit slips.

Outstanding check Payable to	Outstanding Check number	Outstanding Amount	Date Cleared

Financial Institution	Type of Account	Date Closed
_____	_____	_____
_____	_____	_____

Complete an Authorization to Close Account form to close your old account and have the remaining balance transferred to your Beacon Community Credit Union account. Please let us know if you would like us to assist you with the closing of your old account by notarizing and mailing the form for you.

# Beacon Community Credit Union Direct Deposit Authorization

Account Holder Return Address and  
Daytime Phone Number

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employer Name and Mailing Address  
And Phone Number

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_:

You are currently depositing:

\_\_\_ My entire paycheck                      \_\_\_ Part of my paycheck \$\_\_\_\_\_(amount)

to the following account:

Financial Institution Name \_\_\_\_\_  
Routing Number \_\_\_\_\_  
Account Number \_\_\_\_\_

Effective \_\_\_\_\_, please stop making deposits to the above account and instead send them to:

New Credit Union Name: **Beacon Community Credit Union**

New Routing Number: **283079298**

New Account Number: \_\_\_\_\_

I hereby authorize my employer or the addressee to initiate entries to my account as indicated above. The authorization is to remain in effect until the company has received written notice from me. I understand I am responsible for the validity of the information on this form.

Signature \_\_\_\_\_ Date \_\_\_\_\_

I have included the following information you may need to process this request:

\_\_\_ My social security number \_\_\_\_\_

\_\_\_ A voided check

# Beacon Community Credit Union Change Automatic Payment Form

Account Holder Return Address and  
Daytime Phone Number

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Employer Name and Mailing Address  
And Phone Number

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_:

My account number with your company is \_\_\_\_\_. You are currently  
withdrawing \$\_\_\_\_\_ (amount) to pay for \_\_\_\_\_ on  
\_\_\_\_\_ (date) from the following account:

Financial Institution Name \_\_\_\_\_  
Routing Number \_\_\_\_\_  
Account Number \_\_\_\_\_

Effective \_\_\_\_\_, please stop making withdrawals to the above account and instead  
Please start making automatic withdrawals from my new account:

New Credit Union Name: **Beacon Community Credit Union**

New Routing Number: **283079298**

New Account Number: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

I have included the following information you may need to process this request:

\_\_\_ My social security number \_\_\_\_\_

\_\_\_ A voided check

# Beacon Community Credit Union Cancel Automatic Payment Form

Account Holder Return Address and  
Daytime Phone Number

Date: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Business Name, Mailing Address  
And Phone Number

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Dear \_\_\_\_\_:

My account number with your company is \_\_\_\_\_. You are currently  
withdrawing \$\_\_\_\_\_ (amount) to pay for \_\_\_\_\_ on  
\_\_\_\_\_ (date) from the following account:

Financial Institution Name \_\_\_\_\_  
Routing Number \_\_\_\_\_  
Account Number \_\_\_\_\_

Effective \_\_\_\_\_, please stop making withdrawals to the above account. Please cancel  
all automatic withdrawals. I will use bill pay or send you a check for future payments.

Please contact me at the above phone number if you have any questions regarding this request.

Signature \_\_\_\_\_ Date \_\_\_\_\_

# Authorization to Close Account Form

Account Holder Return Address and  
Daytime Phone Number

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Financial Institution Name, Mailing Address  
And Phone Number

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

To Whom it My Concern:

Effective \_\_\_\_\_, please close my account:

Account number(s): \_\_\_\_\_

Account name \_\_\_\_\_

Please send my remaining balance:

\_\_\_\_\_ to me at the address above

\_\_\_\_\_ to Beacon Community Credit Union at the address below;

New Credit Union Name: **Beacon Community Credit Union**  
**7910 National Turnpike**  
**Louisville, Kentucky 40214**  
**(502) 366-6022**

New Routing Number: **283079298**

New Account Number: \_\_\_\_\_

Please contact me at the above phone number if you have any questions regarding this request.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Print Name \_\_\_\_\_

Signed before me, a Notary Public, this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Notary Signature \_\_\_\_\_ Date \_\_\_\_\_

My Commission Expires: \_\_\_\_\_