



Madison
Credit
Union

madisoncu.com | 608-266-4750

Switch Kit

We're excited you're making the switch to Madison Credit Union! Follow this guide for a seamless transition.

1. After you've opened your new MCU savings and checking accounts, switch your direct deposits to your MCU accounts. Use one **Direct Deposit Transfer Request Form** for each depositor.
 - Direct Deposits (Employer)
 - Retirement or Pension Plan Deposits
 - Government Direct Deposits (Social Security)

2. If you currently have automatic payments withdrawn from your old account, stop payments from the old account and direct new payments from your MCU account. For many merchants/payees, the change can be made electronically by logging in to their website. Alternately, complete the **Automatic Payment Request Form** and mail it to each merchant/payee.
 - Mortgage Payment(s)
 - Insurance Premium Payment(s)
 - Gas/Electric Company
 - Water Company
 - Telephone Company
 - Internet Service Provider
 - Cable Service Provide
 - Cellular Phone Company
 - Credit Card Company
 - Charitable Donations

3. **Close your old account.** Once all outstanding checks and automatic withdrawals have cleared your old account, and there are no pending transactions, close your old account. Complete the **Close Account Form** and mail it to your old financial institution.

4. If you need help or have questions, don't hesitate to contact us at 608-266-4750.

Madison Credit Union Routing Number: 275978721

Your MCU Account Number: _____ Savings Suffix: _____ Checking Suffix: _____



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Direct Deposit Transfer Request Form

Date: _____

To: _____
Employer/Depositor Name

_____ Address

_____ City, State, Zip

To Whom It May Concern:

You are currently electronically depositing funds to the following account:

Old Account Information

_____ Financial Institution

_____ Routing Number

_____ Account Number

Please stop depositing to the above account and begin depositing to the account listed below:

New Account Information

Madison Credit Union
_____ Financial Institution

275978721
_____ Routing Number

_____ Account Number: _____ 3-Digit Suffix

Thank-you,

Signature

Name (Please Print)

Address

City, State, Zip

Phone

*Remember to include a voided check with your request and mail/deliver to your employer/depositor for processing



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Automatic Payment Request Form

Date: _____

To: _____
Merchant/Payee Name

_____ Address

_____ City, State, Zip

To Whom It May Concern:

You are currently authorized to automatically withdraw my payment each month from the account listed below:

Old Account Information

_____ Financial Institution

_____ Routing Number

_____ Account Number

Please stop withdrawing from the about account effective immediately and begin to withdraw from the account listed below::

New Account Information

Madison Credit Union

_____ Financial Institution

275978721

_____ Routing Number

_____ Account Number: _____ 3-Digit Suffix

Thank-you,

_____ Signature

_____ Name (Please Print)

_____ Address

_____ City, State, Zip

_____ Phone

*Remember to include a voided check with your request and mail/deliver to the merchant/payee for processing



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Close Account Form

Date: _____

To: _____
Employer/Depositor Name

Address

City, State, Zip

To Whom It May Concern:

Please close my account, number _____, and forward the funds remaining to
my account at Madison Credit Union, 949 E. Washington Ave., Madison, WI 53703.

New Account Information

Madison Credit Union

Financial Institution

275978721

Routing Number

Checking Account

Savings Account

Account Number

Thank-you,

Signature

Name (Please Print)

Address

City, State, Zip

Joint Owner Signature (if applicable)

Joint Owner Name (Please Print)

Date

*Be sure to leave sufficient funds in your account long enough for outstanding checks and automatic withdrawals to clear. Once all transactions have posted, mail or deliver this form to your old financial institution.