

MCU's *Fast Switch Kit*

1. Get organized.



Complete the [Transaction Checklist](#) with payments and deposits that are currently in your old account. Pro Tip: gather 2-3 months of your most recent bank statements from your old financial and write down what automatic deposits and withdrawals are made.

2. Transfer your direct deposits to MCU.



Send the [Direct Deposit Authorization Form](#) to your employer so your funds can be automatically deposited to your MCU account. If you have direct deposits going elsewhere, you can also use this form to switch them to your new MCU account.

3. Move your automatic payments to MCU.



If you currently have automatic payments withdrawn from your old account, stop payments from your old account and move them to your new MCU account. For many merchants/payees, the change can be made electronically by logging into their website or via phone. Alternatively, you can complete our handy [Automatic Payment Authorization Form](#) and mail it to each merchant/payee.

4. Say “adiós” to your old account.



Once all your automatic payments have been moved over from your old account, close it! Send our [Account Closing Letter](#) to notify your previous financial institution to close your account and let them know how to disburse any of your remaining funds. Make sure all your checks and debits have cleared before closing the account.



Madison
Credit
Union

MCU Switch Kit

949 E. Washington Ave.
608-266-4750 | MadisonCU.com

Direct Deposit Authorization Form

TO WHOM IT MAY CONCERN

Effective immediately, I authorize the transfer of my direct deposit to be made to my new account at Madison Credit Union. Please accept this letter as written authorization.

COMPANY INFORMATION

Employer/Company Name

Address

City, State, Zip

MY INFORMATION

Full Name

Address

City, State, Zip

Email

Phone

DIRECT DEPOSIT INSTRUCTIONS

Financial Institution: Madison Credit Union

Routing Number: 275978721

Deposit the entire amount into account number: _____

Deposit: \$ _____ checking
 savings account number: _____

checking
and the remainder into savings account number: _____

Signature

Date

Print Name



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MCU Account Number is Member
Number + 3-digit suffix:

000 - Savings Account
077 - Fee Free Checking
075 - Interest Checking

Automatic Payment Authorization Form

Complete this form for each payment vendor. Remember, you can also set up automatic payments directly in online banking or our mobile app with MCU's Bill Pay!

ATTENTION:

Vendor/Company Name _____ Account Number _____

Address _____ City, State, Zip _____

FROM

Full Name _____

Address _____ City, State, Zip _____

Email _____ Phone _____

TO WHOM IT MAY CONCERN

I have recently switched financial institutions. Effective immediately, please direct my automatic payments to begin withdrawing from my new Madison Credit Union account. This authorization begin immediately and will remain in effect until I notify you to cancel this request.

NEW FINANCIAL INFORMATION

Financial Institution: Madison Credit Union

Routing Number: 275978721

Account Number: _____

Checking Savings

Signature _____ Date _____

Print Name _____



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MCU Account Number is Member Number + 3-digit suffix:
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Notice to Close Account

ATTENTION

Old Financial's Name

Address

City, State, Zip

TO WHOM IT MAY CONCERN

Please accept this letter as authorization to close my accounts, see list below, with your institution. Please issue a cashier's check in my name for the remaining balance(s) along with all accrued interest (if applicable).

Account Type	Account Number	Account Owner(s)

PLEASE SEND ALL CLOSING BALANCES TO:

Full Name

Address

City, State, Zip

Email

Phone

Primary Account Owner Signature

Print Name

Date

Secondary Account Owner Signature

Print Name

Date



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