

Switch Kit

Change
is
Good



OneNevada[®]
CREDIT UNION

Switch Kit Checklist

Thank you for choosing One Nevada Credit Union. We're dedicated to ensuring that your transition is a smooth one. The five easy steps below will guide you through the process of switching your accounts to us.

Step 1 **Get Organized**

- Gather all pertinent information about your existing account.
- Review your last few statements and note all automatic payments. (Remember to leave sufficient funds to cover any outstanding checks or pending automatic payments.) **Note:** keep in mind that not all automatic payments that you have previously established occur on a monthly basis. For example, insurance payments, automobile association dues and federal and state tax returns/ payments can occur on irregular intervals such as bimonthly, quarterly or even an annual basis.

Step 2 **Move Your Direct Deposit & Automatic Payments**

- Prepare to move your direct deposit by completing the Direct Deposit Transfer Letter. **Note:** you may be asked to fill out an additional form by the party making the direct deposit.
- To transfer Social Security direct deposit, you can either call Social Security Administration at **(800) 772-1213** or go to www.ssa.gov/deposit/howtosign.htm
- Set up new automatic payments. You can use our Automatic Payment Transfer Letter, or consider our Online Banking with Free Bill Pay as an alternative that gives you more control over your money. (If you're setting up more than one automatic payment, print or make additional copies of the Automatic Payment Transfer Letter for each automatic payment).

Step 3 **Close Your Old Account**

- Confirm all checks have cleared and all automatic payments have been made.
- Complete the Account Closure Request Letter and send it to your old bank. Remember that some financial institutions may require you to fill out additional forms. If your account is an interest-bearing account, please consider your account closing date carefully.
- Destroy any unused checks, ATM/debit cards, and deposit slips associated with your old accounts.
- Start using your new One Nevada account exclusively.

Step 4 **Keep Copies For Your Records**

- Remember to keep a copy of all documents, letters and forms for your personal records.

Step 5 **Transfer Other Accounts**

- Consider making your financial life less complicated by transferring other accounts to One Nevada. Transfer your credit card balances to our Visa® Platinum Card and enjoy low rates on balance transfers. With all of your funds in one place, your banking will be easier. Our financial service representatives will be better able to help you manage your finances and find ways to make your money work harder for you.
- Call us at **(800) 388-3000**, visit one of our branches or visit us online at OneNevada.org and we will be happy to assist you.

We're here to help you make the switch an easy one.
Thanks again for choosing One Nevada.

Direct Deposit Transfer Letter

Complete and sign this form for every party (i.e. employer, vendor) initializing a direct deposit to your account. Then, give this signed form, along with a voided check from your new One Nevada account, to the party making the direct deposit.

Establish Direct Deposit

Change my existing Direct Deposit

Company Information

Company Name _____
Address _____
City _____ State _____ Zip _____ Phone # _____

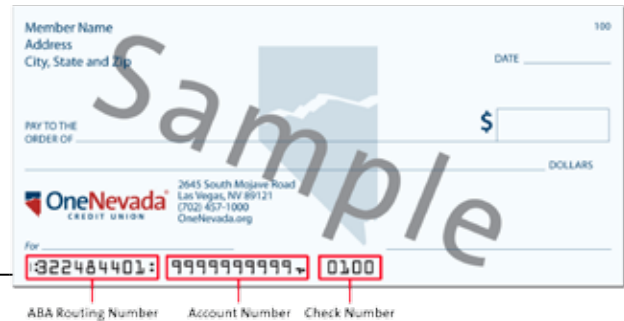
Customer Information

Name _____ Employee ID#/Account# _____
Social Security # _____
Address _____
City _____ State _____ Zip _____ Phone # _____

Credit Union Information

One Nevada Credit Union

Routing Number _____



Deposit Information

Note: You can route your direct deposit to more than one account.

1. Account Type:

One Nevada Checking

One Nevada Savings

Account Number: _____

Amount \$ or % (circle one) _____

2. Account Type:

One Nevada Checking

One Nevada Savings

Account Number: _____

Amount \$ or % (circle one) _____

I authorize _____ (employer/company) to make deposits directly to my One Nevada account(s) indicated above, and authorize the Credit Union to accept such deposits.

Customer Signature _____ Date _____

Automatic Payment Transfer Letter

Date _____
Name of Institution _____
Address _____
City _____ State _____ Zip _____

To Whom It May Concern

I would like to change my payment instructions. Currently, you are debiting payment from my old bank account at:

Former
Bank/
Credit
Union

Name _____
Routing Number: _____ Account Number: _____

As of _____ (date), please stop debiting this account and start debiting this payment from my new account at One Nevada. My new information is as follows:

One Nevada Credit Union

Routing Number: _____ Account Number: _____

Current
Credit
Union

Member Name _____ 100
Address _____
City, State and Zip _____ DATE _____
PAY TO THE ORDER OF _____ \$ _____
DOLLARS
OneNevada CREDIT UNION 2645 South Mojave Road
Las Vegas, NV 89121
(702) 457-1000
OneNevada.org
For _____
⑆322484401⑆ 9999999999 0100
ABA Routing Number Account Number Check Number

Please send me a written confirmation of the date this change will be effective on your systems.

Customer's Signature _____

Print Name _____

Account Number with Payee _____

Address _____

City _____ State _____ Zip _____

Account Closure Request Letter

Date _____
Name of Institution _____
Address _____
City _____ State _____ Zip _____

To Whom It May Concern

This letter is to inform you that I have decided to close the account(s) listed below as of _____ (date).

Please close the account(s) noted below and mail the balance and any interest earned to my address.

Please close the account(s) noted below and wire the balance and any interest earned to my new One Nevada account, also noted below.

Account 1 Old Account Number: _____ Old Routing Number: _____
to One Nevada Credit Union
New Account Number: _____ New Routing Number: _____

Account 2 Old Account Number: _____ Old Routing Number: _____
to One Nevada Credit Union
New Account Number: _____ New Routing Number: _____

Account 3 Old Account Number: _____ Old Routing Number: _____
to One Nevada Credit Union
New Account Number: _____ New Routing Number: _____

Upon closure of the account(s), please send a confirmation to the address below.

Sincerely,

Customer's Signature _____

Print Name _____

Account Number with Payee _____

Address _____

City _____ State _____ Zip _____