



NEW HORIZONS CREDIT UNION

Solutions for the Real World

Thank you for choosing New Horizons Credit Union!

Enclosed you will find everything you need to switch your checking account from your previous financial institution to New Horizons Credit Union. After completing the four SIMPLE steps outlined below, your switch will be complete!

Step 1: STOP USING YOUR PREVIOUS CHECKING ACCOUNT.

After opening your new New Horizons Savings/Share account to establish membership, open a New Horizons Credit Union free checking account. Before you close out your other account, allow time for all outstanding checks and debits to clear from your previous account - usually about 10 days. You should leave your previous account open until all direct deposits and automatic payments have successfully switched to New Horizons Credit Union.

Step 2: MOVE DIRECT DEPOSITS TO NEW HORIZONS CREDIT UNION.

Notify anyone making direct deposits to your previous account of your New Horizons Credit Union account information. Enclosed is a Direct Deposit Authorization Form to assist you in quickly making this switch. PLEASE NOTE: Other documents may be required to make this change. Please contact anyone making direct deposits to your previous account to verify the documentation they require.

Step 3: TRANSFER ANY AUTOMATIC PAYMENTS TO NEW HORIZONS CREDIT UNION.

Notify anyone deducting automatic payments from your previous account of your New Horizons Credit Union account information. Enclosed is an Automatic Payment Form to assist you in quickly making this switch.

Step 4: CLOSE YOUR PREVIOUS CHECKING ACCOUNT.

After all your checks and automatic payments have cleared, close your previous checking account. Enclosed is a form to notify your previous financial institution of your decision to close your account(s).

That's it! It's really that simple! In no time, you will have switched financial institutions. Thank you for choosing New Horizons Credit Union. If we can be of any assistance throughout this transition, please do not hesitate to call us toll free at 1-800-824-3610.

Welcome to the family!



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AUTOMATIC PAYMENT AND DIRECT DEPOSIT CHECKLISTS

Use this checklist to take an inventory of your automatic payments and direct deposits.
PLEASE NOTE: You should leave your account open until all direct deposits and automatic payments have successfully switched to your New Horizons Credit Union account. This checklist will help you through that process.

Automatic Payment Checklist				
Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loans				
Insurance				
Credit Cards				
Gas/Oil				
Electricity				
Cable/TV				
Telephone				
Cell Phone				
Water				
Garbage				
Internet Provider				
Health Club				
Investments				
IRA/Retirement				
Charities				
Daycare				
Other				

Direct Deposit Checklist				
Direct Deposit	Company	Account Number	Amount	Date of Payment
Employee Payroll				
Pension/Retirement				
Social Security				
Investment Income(s)				
Other				

*Other information may be needed depending on the financial institution



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AUTOMATIC PAYMENT AUTHORIZATION FORM

To: _____

Date: _____

This letter serves as authorization to change the account information for automatic payments in the name(s) of _____, your customer number _____.

I/We have changed accounts to New Horizons Credit Union, and the current account number that you are using will no longer be valid.

Effective immediately, the new information is as follows:

Routing Number: **265176339** _____

New Account Number: _____

If you have any questions regarding this matter, or if this letter is NOT sufficient enough to make this change, please contact _____ at _____. Please remit all correspondence to _____
_____.

Thank you for your assistance in this matter.

I hereby authorize the change to my account.

Account Holder Signature

Date

Phone Number

Account Holder Signature

Date

Phone Number



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DIRECT DEPOSIT AUTHORIZATION FORM

Type of Direct Deposit:

- Employee/Payroll Social Security
 Pension/Retirement Investment Income
 Other (please specify) _____

To: _____

Date: _____

This letter serves as authorization to change the account information for direct deposits in the name(s) of _____, your customer number _____.

I/We have changed accounts to New Horizons Credit Union, and the current account number that you are using will no longer be valid.

Effective immediately, the new information is as follows:

Routing Number: **265176339** _____

New Account Number: _____

If you have any questions regarding this matter, or if this letter is NOT sufficient enough to make this change, please contact _____ at _____. Please remit all correspondence to _____

Thank you for your assistance in this matter.

I hereby authorize the change to my account.

Account Holder Signature

Date

Phone Number

Account Holder Signature

Date

Phone Number



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AUTHORIZATION TO CLOSE ACCOUNTS

To: _____

Date: _____

Please accept this letter as authorization to close account(s) listed below and transfer the balance plus any accrued interest to my new account at New Horizons Credit Union.

Immediately close and transfer the balances in the following account(s):

Account # _____	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> Money Market
Account # _____	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> Money Market
Account # _____	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> Money Market

Please make check payable to New Horizons Credit Union for credit to the new account number. New account information is as follows:

Name: _____

Routing Number: **265176339** _____

Account Number: _____

If you have any questions regarding this matter, or if this letter is NOT sufficient enough to make this change, please contact _____ at _____. Please remit all correspondence to _____

Thank you for your assistance in this matter.

I hereby authorize the closing of this account and transfer of funds.

Account Holder Signature

Date

Phone Number

Account Holder Signature

Date

Phone Number

*Other information may be needed depending on the financial institution.