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 is it! It is 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!
**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.

<table>
<thead>
<tr>
<th>Automatic Payment Checklist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Payment</strong></td>
</tr>
<tr>
<td>Mortgage/Rent</td>
</tr>
<tr>
<td>Auto Loans</td>
</tr>
<tr>
<td>Insurance</td>
</tr>
<tr>
<td>Credit Cards</td>
</tr>
<tr>
<td>Gas/Oil</td>
</tr>
<tr>
<td>Electricity</td>
</tr>
<tr>
<td>Cable/TV</td>
</tr>
<tr>
<td>Telephone</td>
</tr>
<tr>
<td>Cell Phone</td>
</tr>
<tr>
<td>Water</td>
</tr>
<tr>
<td>Garbage</td>
</tr>
<tr>
<td>Internet Provider</td>
</tr>
<tr>
<td>Health Club</td>
</tr>
<tr>
<td>Investments</td>
</tr>
<tr>
<td>IRA/Retirement</td>
</tr>
<tr>
<td>Charities</td>
</tr>
<tr>
<td>Daycare</td>
</tr>
<tr>
<td>Other</td>
</tr>
</tbody>
</table>

**Direct Deposit Checklist**

<table>
<thead>
<tr>
<th>Direct Deposit</th>
<th><strong>Company</strong></th>
<th><strong>Account Number</strong></th>
<th><strong>Amount</strong></th>
<th><strong>Date of Payment</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Payroll</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pension/Retirement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Security</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investment Income(s)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Other information may be needed depending on the financial institution*
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 (RTN): 265176339

Choose Account to use:

___ Prime Savings Account: ______________________ (Please, No Dashes, or Share ID)

___ Checking Account Number: (12-digit number: 701190 __ __ __ __ __ __

**We are only able to accept electronic deposits and payments to a Prime share or Checking account. We cannot accept payments directly to a loan. **

If you have any questions regarding this matter, or if this letter is NOT sufficient 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

*Other information may be needed depending on the financial institution.*
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 (RTN): 265176339

Choose Account to use:

___ Prime Savings Account: _______________________ (Please, No Dashes, or Share ID)

___ Checking Account Number: (12-digit number: 701190 __ __ __ __ __ __)

**We are only able to accept electronic deposits and payments to a Prime share or Checking account. We cannot accept payments directly to a loan.**

If you have any questions regarding this matter, or if this letter is NOT sufficient 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 __________

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

<table>
<thead>
<tr>
<th>Account #</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Checking</td>
<td>Savings</td>
<td>Money Market</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

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 (RTN): 265176339

Choose Account to use:

___ Prime Savings Account: ________________ (Please, No Dashes, or Share ID)

___ Checking Account Number: (12-digit number: 701190 __ __ __ __ __ __ __)

**We are only able to accept electronic deposits and payments to a Prime share or Checking account. We cannot accept payments directly to a loan.**

If you have any questions regarding this matter, or if this letter is NOT sufficient 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.*