



*get more.*  
**ENJOY MORE.**



SWITCH TO ALIVE AND **GET MORE**  
FROM YOUR BANKING!

**alive**   
CREDIT UNION®  
*Bank Healthier. Live Happier.*



**Interested in switching your accounts to Alive Credit Union but not sure how to get started?**

That's why we developed the Alive Credit Union Switch Kit, a step-by-step checklist to help make your transition to a new Alive Credit Union account quick and easy. Just follow the simple steps to get started.

If we can be of any assistance throughout the transition, please call any of our branch locations or our customer service team at **904.296.1292**.

***Thank you for choosing Alive Credit Union. We value and appreciate your membership!***



## **Making the switch to Alive Credit Union is as easy as 1, 2, 3**

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Please open your new account and follow the steps below before you close your current account to prevent service interruption. If at any time you need assistance with this process, please contact our Member Services Team.



### **Update Your Direct Deposit Information** ***Transferring Your Direct Deposit***

Complete this direct deposit form and attach a voided check or signed letter from your Alive Credit Union Member Service Representative. Give both items to your employer's payroll department or appropriate government agencies. For social security, simply make a toll-free call to **1.800.772.1213** to make the switch.



### **Organize Your New Account** ***Schedule Automatic Payments***

If you currently make automatic payments (car payment, mortgage, etc.), complete and send an automatic withdrawal form to each vendor. You can also check each vendor's website to see if there's a quicker way to set up automated payments from your new account.

### ***Activate Your New Online Bill Pay***

If you currently pay bills online (Online Bill Pay), make sure to cancel all bill payments from your previous account and set them up in your new Alive Credit Union account. You'll need the account number, mailing address, and phone number for each vendor you want to pay through online banking.



### **Close Your Account with Your Previous Financial Institution** ***The Final Step***

After you've organized your new Alive Credit Union account and you're certain all of your transactions and checks have cleared on your old account, complete and send this [closing form](#) to your previous financial institution. They will mail you a check for any remaining balance in the account. You can then deposit those funds into your new Alive Credit Union account.



# Automatic Payments & Deposits

Use this form to gather all of your auto pay and deposit information in one place for easy reference.

## Automatic Payment Checklist

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loans				
Insurance				
Credit Cars				
Gas/Oil				
Electric				
Cable/TV				
Telephone				
Cell Phone				
Water				
Trash Removal				
Internet Provider				
Health Club				
Investments				
IRA/Retirement				
Charities				
Daycare				
Tuition/School				
Other				

## Direct Deposit Checklist

Payment	Company	Account Number	Amount	Date of Payment
Employee Payroll				
Pension/Retirement Plans				
Social Security				
Investment Incomes				
Other				

## Helpful Phone Numbers & Websites

Social Security Administration	800.722.1213	ssa.gov
Office of Personnel Management	800.767.6738	opm.gov
Railroad Retirement Board	800.808.0772	rrb.gov
Department of Veterans Affairs	877.838.2778 or 800.827.1000	va.gov

# Please close my account.

Upon receipt, please close the following account, and send a check to me for the remaining balance and confirmation of account closure to the address below. If you have any questions about this request, please contact me at the number below.

## Closed account information

☐ Checking Account

☐ Savings Account

Financial Institution Name

Account #

## Member information

Name

Phone #

Joint Account Owner Name (if applicable)

Address

City

State

Zip Code

## The dotted line

Member Signature

Date

Joint Account Owner Signature (if applicable)

Date

# Authorization to change direct deposit

Please deposit my check(s) directly into my new account as indicated below.

## Direct deposit account information

Company Name

Company Address

City

State

Zip Code

## Type of deposit

☐ Employee Payroll

☐ Social Security

☐ Other:

☐ Supplemental Security Income

☐ Civil Service Retirement

☐ VA Compensation / Pension

☐ Pension

## Member information

Name

Phone #

Address

City

State

Zip Code

Employee or Social Security Number

## Previous account information

☐ Checking Account

☐ Savings Account

Previous Financial Institution Name

Routing #

Previous Account #

## New account information

☐ Checking Account

☐ Savings Account

*Alive Credit Union*

*263078837*

New Financial Institution Name

Routing #

New Account #

Effective Date

Member Signature

Date

# Authorization to change automatic payment

Please update my existing authorization for payment. I have opened a new account and would like to establish automatic payments from this account.

## Company/Merchant Information

Company Name

Company Address

City

State

Zip Code

Account Number on Invoice / Statement

## Previous account information

☐ Checking Account

☐ Savings Account

Previous Financial Institution Name

Routing #

Previous Account #

## New account information

☐ Checking Account

☐ Savings Account

*Alive Credit Union*

*263078837*

New Financial Institution Name

Routing #

New Account #

Effective Date

Amount to be withdrawn

Date of withdrawal

## Member information

Name

Phone #

Joint Account Owner Name (if applicable)

Address

City

State

Zip Code

Member Signature

Date