



Steps to Switching:

- 1.** Come by a local the CREDIT UNION for Robertson County branch to open a savings and checking account. Don't forget to also check out our loan rates and other great accounts we offer. A \$25 deposit is required to open your savings, but makes you a member. Ask your member service representative about all the benefits to being a member at your credit union.
- 2.** Stop using your old checking account and allow time for the checks you have already written to clear. Typically this takes about two weeks.
- 3.** Visit your payroll department to see if direct deposit or payroll deduction to the CREDIT UNION for Robertson County is available. If you already use direct deposit just drop off our provided form to change it (your employer may require an additional form to change your payroll).
- 4.** Complete the forms necessary to change your automatic payments. Remember to change the payments that automatically draft using both your account number and your debit card number. You may need more than one copy of the automatic payment change form.
- 5.** Completely close out the old checking account. You can use our closing account form to conveniently send all of your information to your old financial institution (your previous financial institution may require additional information beyond the provided form to close your account).

If there are any questions or concerns during this switching process please do not hesitate to contact us:

Phone: (615) 382-8255

Toll Free Phone: 1-877-965-5308

Email: thecu@thecreditunionforrobtco.org

Or visit our website for more information:

www.thecreditunionrobtco.org



Switch Kit Transfer Checklist:

	Company/ Financial Institution	Account Number	Type of Account	Date Contacted	Follow-up Date	Date Complete
Direct Deposit						
Direct Deposit						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Account Closure						
Account Closure						

Notes:



Authorization to Close Account

To Whom It May Concern:

Please close my accounts under the following information and send me a check at the following address.

Date: _____

Bank Name: _____

Account Number: _____

Name: _____

Address: _____

City/ State/ Zip: _____

If there are any questions or concerns about this request, please contact me immediately.

Telephone: _____

Email: _____

Thank You!

Signature: _____

Printed Name: _____

For Credit Union Member: If the closing bank requires this letter to be notarized we offer free notary service at our main branch.



Automatic Withdrawal Change Form

To Whom It May Concern:

Please change the account for my automatic withdrawal:

Date: _____

Company Making Deposit: _____

Company Address: _____

City/State/Zip: _____

I have changed financial institutions and am therefore moving my account to The Credit Union for Robertson County. You are currently debiting my account with the following information:

Former Financial Institution: _____

Routing Number: _____

Account Number: _____

Payment Amount: _____

Please stop making withdrawals from this account on this date: _____

Please begin making these withdrawals from my new account at The Credit Union for Robertson County.

The Credit Union for Robertson County, 2416 Memorial Blvd., Springfield, TN 37172

Routing Number: **264181590**

Account Number: _____

If there are any questions or concerns about this request, please contact me immediately.

Telephone: _____

Email: _____

Thank You!

Signature: _____

Printed Name: _____



Direct Deposit/ Payroll Deduction Change Form

To Whom It May Concern:

Please change the account for my direct deposit/payroll deduction:

Date: _____

Company Making Deposit: _____

Company Address: _____

City/State/Zip: _____

I have changed financial institutions and am therefore moving my account to The Credit Union for Robertson County. You are currently depositing my payroll at the following information:

Former Financial Institution: _____

Routing Number: _____

Account Number: _____

Payment Amount: _____
(if deduction list amount, if direct deposit use Net Pay)

Please stop sending my payroll to this account on this date: _____

Please begin making these payroll deposits into my new account at The Credit Union for Robertson County.

The Credit Union for Robertson County, 2416 Memorial Blvd., Springfield, TN 37172

Routing Number: **264181590**

Account Number: _____

Amount to Send: _____
(if deduction list amount, if direct deposit use Net Pay)

If there are any questions or concerns about this request, please contact me immediately.

Telephone: _____

Email: _____

Thank You!

Signature: _____

Printed Name: _____

For Credit Union Member: This form goes to your payroll department. You may also need to fill out your company's own form. Make sure to take a blank, voided check from you new account.