



Locally connected. Personally invested.

## CHECKING ACCOUNT SWITCH KIT

**Switching is easy and we can help.**  
*It's easy, convenient, and hassle-free.*  
*With this easy-to-use switch kit,*  
*you can:*

- Open your new account
- Close your old account
- Transfer direct deposit and automatic payments

Making the switch to



it's as easy as

**1 2 3**

**1.**

**Download and print the Switch Kit forms.**

**2.**

**Bring the completed forms with you to any TBA office or fax them to (231) 932-5050.**

**3.**

**Let us take care of the rest.**

### Questions?

If you have any questions about switching your checking account to TBA Credit Union, visit one of our offices or call us at (231) 946-7090.

*Tell us about yourself . . .*

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Employer \_\_\_\_\_

Individual \_\_\_\_\_ Joint \_\_\_\_\_

*(If joint, complete information for second signer below.)*

Name \_\_\_\_\_

Address \_\_\_\_\_

Phone \_\_\_\_\_

Email \_\_\_\_\_

Social Security # \_\_\_\_\_

Date of Birth \_\_\_\_\_

Employer \_\_\_\_\_

Individual \_\_\_\_\_ Joint \_\_\_\_\_

*A representative will request a copy of your driver's license when you open your account.*

## Automatic Payment Checklist

Review this list for companies you may need to contact regarding your new checking account. Once you have notified them (using the form below), these companies should establish automatic payments from your new checking account. Questions? Call us at **(231) 946-7090**.

- Mortgage
- Loans
- Cable
- Investments
- Insurance
- Cell
- Telephone
- Charities
- Gym
- Utilities
- Credit Card
- Internet

## Automatic Payment Change Notification

Please complete the following:

Name \_\_\_\_\_

Daytime Phone \_\_\_\_\_

I hereby authorize you to redirect future automated payments to my new TBA Credit Union Checking Account. I have attached a copy of a new voided check for reference. Please make this change effective as of:

\_\_\_\_\_  
Date

\_\_\_\_\_  
My account # with your company

\_\_\_\_\_  
Signature Date

## Direct Deposit Change Notification

I hereby authorize my direct deposit to be sent to my new TBA Credit Union Checking Account. I have attached a copy of a new voided check for reference. Please make this change effective as of:

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature Date

### Previous Financial Institution:

\_\_\_\_\_  
Name of Institution

\_\_\_\_\_  
Account #

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State/Zip

### NEW FINANCIAL INSTITUTION:

**TBA Credit Union  
PO Box 1049  
Traverse City, MI 49685  
(231) 946-7090**

**Routing #: 272485424**

\_\_\_\_\_  
TBA Credit Union Checking Account#

## Checking Account Closure Authorization

\_\_\_\_\_  
Name

\_\_\_\_\_  
Phone

\_\_\_\_\_  
Joint Owner (if applicable)

### Previous Financial Institution:

\_\_\_\_\_  
Name of Institution

\_\_\_\_\_  
Account #

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Checking Account #

**Please mail balances to:  
TBA Credit Union  
PO Box 1049  
Traverse City, MI 49685  
(231) 946-7090**

\_\_\_\_\_  
TBA Credit Union Checking Account #

I hereby authorize the closure of my checking account. I have verified that all my outstanding checks have cleared and all previous direct deposits automatic payments have been stopped.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Owner (if applicable)

\_\_\_\_\_  
Date