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814-226-5032 814-715-7160 814-670-0659 724-556-5250 724-551-7010

Account Switch Guide

Thank you for choosing Top Tier Federal Credit Union! The following information will help ease your account transition. Your account switch guide includes:

- Account closing process
- Transition checklist
- Change of direct deposit form
- Change of automatic payments form

Closing your account at another financial institution

The easiest part of the transition process is closing your account at another financial institution. You simply need to visit your financial institution and request to close your account. Make sure you have completed the items listed below before closing your other account:

- All pending transactions have cleared old account
- Switch direct deposit to new Credit Union account
- Switch all automatic payments to new Credit Union account
- Contact financial institution and request to close your old account(s)
 - Request cash or check for remaining funds
- Deposit funds in your new Credit Union account

Transition checklist—for your records/use

List all of your direct deposits and automatic payments below:

Direct Deposits to change:

- _____
- _____
- _____
- _____
- _____

Automatic Payments to change:

- Company Name: _____
- Company Name: _____
- Company Name: _____
- Company Name: _____
- Company Name: _____

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Changing Your Automatic Payments

Changing the automatic payments that come out of your account can be a little time consuming but knowing how to change them and having the information you need can make the change easier. Refer to your transition checklist for your list of automatic payments that need changed.

You will need the following information to update your automatic payments:

- Credit Union routing number: 243380192
- Credit Union Checking account number: _____

Updating payment information online

The best way to contact the merchant is to visit their website and log in or create your account. Typically payment methods can be updated by selecting one of the following:

- | | |
|-----------------------|------------------------------------|
| • Billing information | <u>Examples:</u> |
| • Settings | • Verizon Wireless account |
| • Profile settings | • Netflix account |
| • View my bill | • Dish Network / Direct TV account |

IMPORTANT TIP— Always remember to SAVE the changes you've made in order to insure your payment information has been updated and stored properly.

Updating payment information by phone

Another avenue to update your payment information is to find a customer service phone number on a previous bill or on the merchants official website.

Examples: Insurance carrier, utilities— gas, electric, water

Not Recommended

You should never send or update your payment information via email due to security reasons. It's best to do it directly from your merchant account, in person or by phone.

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Change of Direct Deposit

Please give to HR / Payroll / Social Security office

► To whom it may concern:

Please begin depositing my: PAYCHECK SOCIAL SECURITY OTHER: _____

Effective: _____

To the following account:

TOP TIER FEDERAL CREDIT UNION

Account Number: _____ Routing Number: **243380192**

Please select one:

Checking

Savings

► If you have any questions about this request, please contact me at:

Phone: _____ Best time to call: _____

Email: _____

► Thank you,

Signature: _____

First Name: _____ Middle Initial: _____ Last Name: _____

Social Security number (last 4 digits): _____ Employee ID : _____

