

# Switch Kit

Easy as 1 – 2 – 3!



Georgia Heritage  
Federal Credit Union

## Checking Account Switch Kit

Easy as 1 – 2 – 3!

Join the Georgia Heritage Family  
the fast, easy, convenient way!

Credit union membership provides easy access to **FREE** checking, **FREE** online banking, **FREE** eStatements and many other **FREE** or low-fee services. Because you're a member-owner of the credit union, you'll enjoy higher yields on savings and lower rates on loans, along with the personalized service that only Georgia Heritage can provide.

We've designed this kit to make it easy for you to switch all your accounts to Georgia Heritage. It includes simple, step-by-step instructions and forms that will make your switch a snap. Questions? Call a Member Service Representative at (912) 236-4400 or stop by a branch at your convenience.

Benefits of making the switch:

- **Free** Online Banking
- **Free** Bill Payment Service
- **Free** eStatements
- **Free** Smartline 24/7 Auto Response
- Access your account at any Credit Union Service Center nationwide ([www.cuservicecenters.com](http://www.cuservicecenters.com) for 3,000+ locations)

## Switch Your Automatic Transactions

Our attached forms can be used to notify companies that you've switched your account to Georgia Heritage. Just fill in the required information, make copies for each applicable company and mail them out!

Here are some examples of the kinds of companies that you may want to notify:

**Direct Deposit.** Companies or government agencies that regularly deposit funds into your checking or savings account. These might include:

- Your employer
- Your pension plan administrator\*
- The Social Security Administration\*

**Automatic Withdrawals.** Companies that regularly make electronic withdrawals from your checking account or automatically assess charges to your credit card or debit card. These might include:

- Your mortgage company
- Your insurance company
- Your cable company
- Your Internet service provider
- Your health club

\*If you receive deposits other than payroll direct deposit, such as retirement or Social Security payments, contact the depositor for instructions on changing these deposits to your new Georgia Heritage FCU account.



## Close Your Old Account

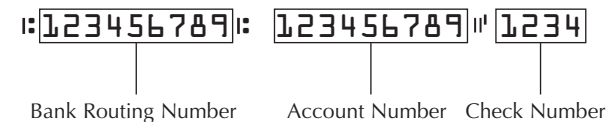
Prior to closing your old account, be sure to leave enough money in the account to cover any outstanding checks and automatic withdrawals. Once all charges have been paid, ask your previous financial institution to send your remaining balance(s) to you or your new Georgia Heritage account(s). Then, destroy your old checks, ATM cards, debit cards and deposit slips.

### Important Numbers for your records:

Credit Union Account Number:

Georgia Heritage FCU Routing # **261271694**

To find the account numbers for your old account, look at the bottom of your checks for a series of numbers. Bank routing numbers are the first nine digits of the series.

  
Bank Routing Number      Account Number      Check Number

Once you've finished these steps, your switch will be complete.

**Welcome to  
Georgia Heritage FCU**  
P.O. Box 1920  
Savannah, GA 31402

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## #1 Notification of Direct Deposit Authorization Change

*This form goes to your employer.*

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please direct all future payroll direct deposits to the following accounts:

**Financial Institution:**

Georgia Heritage Federal Credit Union

P.O. Box 1920

Savannah, GA 31402

Routing # **261271694**

**Net paycheck to** (check one):

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

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

Start Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
month day year

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Other information your employer may need:

\_\_\_\_\_  
(Employee ID #, etc.)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

This is a change in authorization for your Direct Deposit. If this change means that you will no longer have sufficient funds in your previous account to cover any automatic withdrawals you may have, please call that company and change the automatic withdrawal to your new Credit Union account. You can also use the Notification of Automatic Withdrawal Change form.

## #2 Notification of Automatic Withdrawal Change

*This form goes to all companies with whom you have automatic withdrawals. Make copies as needed.*

**To Whom It May Concern:**

\_\_\_\_\_  
(Name of Company)

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

Payment Amount: \$ \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Please discontinue my automatic withdrawal from the following account:**

Former Financial Institution: \_\_\_\_\_

Routing # \_\_\_\_\_

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

Please make all future automatic withdrawals from the following accounts:

**Financial Institution:**

Georgia Heritage Federal Credit Union

P.O. Box 1920

Savannah, GA 31402

Routing # **261271694**

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

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

## #3 Notification of Account Closure

*This form goes to the financial institution where you will be closing your account.*

**To Whom It May Concern:**

\_\_\_\_\_  
(Financial Institution Name)

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

**Effective On:** \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
month day year

**Please close my account:**

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

Primary Owner: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Please send the remaining balance to (check one):

**MY NEW ACCOUNT**

**Financial Institution:**

Georgia Heritage Federal Credit Union

P.O. Box 1920

Savannah, GA 31402

Routing # **261271694**

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

**MY ADDRESS LISTED ABOVE**

\_\_\_\_\_  
Primary Owner Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Joint Owner Signature

\_\_\_\_\_  
Date