

\$switchKIT



IT'S EASY
TO MAKE THE \$WITCH
TO COREPLUS

COREPLUS CREDIT UNION
CorePlus
Smart Banking. Community Trusted.

Give us a call at **860-886-0576** or visit us online at **CorePlus.org**



Making the Switch to CorePlus—it's easy!

Interested in switching your accounts to CorePlus Credit Union, but not sure how to get started?

We've developed the CorePlus Switch Kit, a step-by-step checklist to help make your transition to a new CPCU account quick and easy. Just follow the simple steps to get started.

If we can be of any assistance throughout the transition, please visit any of our branch locations or call our member communications center at **800.724.0779**. Thank you for choosing CorePlus Credit Union. We value and appreciate your business!

1) Two convenient ways to open a membership.

- Stop in any branch location listed on our website (coreplus.org).
- Visit coreplus.org to open an account online.

2) Sign up for CPCU iBanking.



- Easily track your direct deposits, automatic withdrawals or payments and checks as they clear your CorePlus Credit Union account. If you have not already enrolled, contact CorePlus Credit Union for a temporary sign-on password.

3) Stop using your former account and begin using your new CorePlus membership as soon as possible.

- Be sure to leave sufficient funds in your former account until all of your checks have cleared and any automatic withdrawals have been successfully transferred to CorePlus Credit Union.

4) Change your Direct Deposits to CorePlus Credit Union.

- Use our attached Direct Deposit Authorization Change Form to change any direct deposits. Remember to attach a voided CorePlus Credit Union check to this form.

5) Change your Automatic Payments or Withdrawals to CorePlus Credit Union.

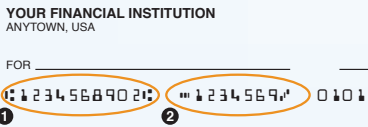
- Use our attached Automatic Payment or Withdrawal Authorization Change Form to change any automatic payment or withdrawal.

6) Close your former account at the other institution.

- Use our attached Account Closing Form to close your account at the other banking institution.
- Once you close your account at the other institution, remember to shred or destroy any old checks for security purposes.

Routing and Account Numbers...
How to find them:

1. The bank's routing number is the 9-digit number located in the bottom left corner of your check.
2. Your account number is the set of numbers appearing just after the routing number or to the right of the check sequence number. Although your Account Number may contain spaces and symbols, do not type them.



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Making the Switch to CorePlus—it's easy!

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 Cards				
Gas/Oil				
Electric				
Cable/TV				
Cell Phone				
Water				
Trash Removal				
Internet Provider				
Gym				
Investments				
IRA/Retirement				
Charities				
Daycare				
Tuition/School Expense				
Other				

Direct Deposit Checklist

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

Helpful Phone Numbers and Web sites

Social Security Administration	800.772.1213	www.ssa.gov
Office of Personnel Management	888.767.6738	www.opm.gov
Department of Veterans Affairs	877.838.2778 or 800.827.1000	www.va.gov



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Account Closing

Use this form to Close Your Account at another financial institution and request a check for the remaining balance.

Date: _____

To: _____ (Bank Name)
_____ (Address)
_____ (City, State, Zip)

Primary Account Holder:
_____ (Name)
_____ (Home Address)
_____ (City, State, Zip)

Secondary Account Holder:
_____ (Name)
_____ (Home Address)
_____ (City, State, Zip)

Note:

- If there are multiple accounts involved please complete a form for each account.
- Verify all checks and payments have cleared prior to submitting this form to close your account.

Please accept this as my authorization and direction to close my account with your institution.

Account Number: _____
Checking Savings CD Money Market (select one)

Please send the check in the amount of my account balance plus any accrued interest to my attention at the address on file.

If you should have any questions regarding this transaction please call me at my daytime phone number: _____.
Thank you for your cooperation.

Sincerely,

(Customer Signature)



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Making the Switch to CorePlus—it's easy!

Automatic Payment or Withdrawal Authorization Change Form

Use this form to change your Automatic Payments or Withdrawals to CorePlus Credit Union (e.g. loan payment, insurance payment, transfers to brokerage accounts or savings accounts).

Date: _____

To: _____ (Company Name)
_____ (Address of Company)
_____ (City, State, Zip)

From: _____ (Name)
_____ (Home Address)
_____ (City, State, Zip)

Note:

- If there are multiple payments involved please complete a form for each.

Please accept this letter as authorization to change the bank account information for automatic payments or withdrawals in the name of: _____, customer account number: _____, payment type: (i.e. Mortgage, Auto, Utilities, etc) _____, approximate amount of transfer _____.

I am aware that some automatic payments or withdrawals require advance notice of changes. Please include those notice periods when determining the new effective date.

Effective immediately, the new bank information is as follows:

CorePlus Credit Union Account Number: _____
Checking Savings CD Money Market (select one)

ABA Bank Routing Number: **211178598**

If you should have any questions regarding this transaction please call me on my daytime phone number: _____. Please send me written confirmation of when the change will be effective.

Thank you for your cooperation.

Sincerely,

(Customer Signature)

If available, attached is a voided check from my account.



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Direct Deposit Authorization Change Form

Use this form to change your direct deposit to CorePlus Credit Union (payroll, dividends, royalties, etc)

Date: _____

To: _____ (Company/Employer Name)
_____ (Address of Employer Company)
_____ (City, State, Zip)

Primary Account Holder:
_____ (Name)
_____ (Home Address)
_____ (City, State, Zip)

Secondary Account Holder:
_____ (Name)
_____ (Home Address)
_____ (City, State, Zip)

Note:

- If there are multiple accounts involved please complete a form for each account.
- Contact your employer(s) concerning Direct Deposit changes
- Verify your HR department does not require the use of their forms.

Please accept this letter as authorization to change the bank account information for direct deposit in the name of: _____, payment type: (i.e. Payroll, Pension/Retirement, Investment Income, other-please specify) _____.

I am aware that some automatic deposits require advance notice of changes. Please include those notice periods when determining the new effective date.

Effective immediately, the new bank information is as follows:

CorePlus Credit Union Account Number: _____
Bank Address: **202 Salem Turnpike, Norwich, CT, 06360**
Checking Savings CD Money Market (*select one*)
ABA Bank Routing Number: **211178598**

If available, attached is a voided check from my account.

If you should have any questions regarding this change, please call me on my daytime phone number: _____.
Please send me written confirmation of when the change will be effective.

Thank you for your cooperation.

Sincerely,

(Customer Signature)



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