



**MIDLAND**  
CREDIT UNION

Invested in your success.

Dear Valued Member;

Now you can make the switch with ease! Our Switch Kit includes everything that you need to switch all your accounts, including auto transactions! We would be happy to assist you with the switch please contact us at the office of your choice, Urbandale, 515-278-1994 or Pleasant Hill, 515-278-5333.

## Switch Kit Check List

- Step 1 – Open a new share draft checking account with Midland.**
- Step 2 – Set up Direct Deposit:**
  - Complete the attached *Notice of Direct Deposit Change*. Additional copies are available on [www.midlandcu.org](http://www.midlandcu.org).
  - Take the form to your employer's payroll department.
  - To change Social Security benefits, you may call 1-800-772-1213 or use Treasury form 1199A. <http://www.ssa.gov/deposit/howtosign.htm>
- Step 3 – Move automatic payments:**
  - Complete a *Notification of Automatic Withdrawal Change* form for each automatic payment, such as a car loan or insurance.
- Step 4 – Close old account(s) and transfer balance once all checks/transactions have cleared.**
  - FIRST, Ensure all checks and transactions have cleared before the account is closed, AND
  - Confirm all automatic payments and direct deposits have moved to your new MCU account.

Date: \_\_\_\_\_

Financial Institution Name: \_\_\_\_\_

Attn: Customer Services Department

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

City, State, Zip: \_\_\_\_\_

**Re: Request to Close Account**

Dear Sir or Madam:

I have recently changed financial institutions and would like you to close the account below immediately:

Account Number: \_\_\_\_\_

Name(s) on the Account: \_\_\_\_\_

\_\_\_\_\_

Please forward all remaining funds to me at the following address:

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

City, State, Zip: \_\_\_\_\_

If you have any questions please call me at:

\_\_\_\_\_

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Joint Account Holder Signature

# Notice of Direct Deposit Change

Date: \_\_\_\_\_

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

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

City, State, Zip: \_\_\_\_\_

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

Financial Institution: Midland Credit Union

Routing Number: 273976181

Start Date: \_\_\_\_/\_\_\_\_/\_\_\_\_  
                  Month Day Year

Please check one:

\_\_\_\_ Net Paycheck to Midland Credit Union Share Draft/Checking

Account Number: \_\_\_\_\_

\_\_\_\_ Net Paycheck to Midland Credit Union Regular Shares/Savings

Account Number: \_\_\_\_\_

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

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

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

City, State, Zip: \_\_\_\_\_

Other Information Your Employer May Need:

\_\_\_\_\_  
(Social Security Number, employee ID#, etc.)

# Notification of Automatic Withdrawal Change

Date: \_\_\_\_\_

## To Whom It May Concern:

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

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

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

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

City, State, Zip: \_\_\_\_\_

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

Old Financial Institution: \_\_\_\_\_

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

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

## Please make all future automatic withdrawals from the following account:

Financial Institution: **Midland Credit Union**

Routing #: 273976181

Account #: \_\_\_\_\_ Checking / Savings  
(Circle One)

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

\_\_\_\_\_  
Date

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

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

City, State, Zip: \_\_\_\_\_