

Harbor Pointe Credit Union Switch Kit Getting Started

Making the move to Harbor Pointe Credit Union is as easy as ABC. Everything you will need is provided in this handy Switch Kit.

We look forward to helping you make Harbor Pointe Credit Union home for all of your financial needs.

A

Open your new account.

Apply online in minutes or visit your local branch to open your new Harbor Pointe Credit Union account(s).

B

Now your account is open...

Switch your direct deposits and automatic withdrawals. If you have any automatic transactions, use the forms to seamlessly switch them to Harbor Pointe Credit Union.

C

Close your old account.

Now that your new account is open, simply fill out the provided form to close your old account. Any remaining account balance will be transferred to Harbor Pointe Credit Union.

Harbor Pointe Credit Union Switch Kit Direct Deposit Authorization

You can use your computer to fill out this form, or you can print the form first and complete it by hand.

Fill out one of these forms for each of your direct deposit and provide it to your employer, retirement or pension fund, or any other agency to deposit your payments directly into your Harbor Pointe Credit Union account.

Notification of Direct Deposit Authorization Change

Company or Employer:
Address:
City, State, Zip:
Phone Number:
Employee ID:

Effective immediately, please send my deposit to my Harbor Pointe Credit Union account.

Place an X next to your desired option:

Net amount to Harbor Pointe Credit Union CHECKING

Account # Routing #

Net amount to Harbor Pointe Credit Union SAVINGS

Account # Routing #

Signature:
Date:
Name:
Address:
City, State, Zip:
Phone:

Checklist for Direct Deposit:

Did you remember all of your direct deposits? Here are the most common direct deposits.

- Social Security
- Investments
- Payroll
- Retirement Plans

Social Security Deposits:

Call: 1-800-772-1213
TTY 1-800-325-0778

Teacher's Retirement Association (TRA) Deposits:

Call: 1-800-657-3669
TTY: 1-800-627-3529



Harbor Pointe
CREDIT UNION

Federally Insured by
NCUA
NATIONAL CREDIT UNION ADMINISTRATION

Harbor Pointe Credit Union Switch Kit Automatic Withdrawal Authorization

You can use your computer to fill out this form, or you can print the form first and complete it by hand.

Fill out this form and send to the financial institution or company you make automatic payments to. Use one form for each automatic withdrawal. Or, many companies and agencies make it easy to change your account information on their website.

Checklist for Automatic Withdrawals

Did you remember all of your automatic withdrawals?

Here are some of the most common automatic payments.

- Home Mortgage
- Utilities
- Insurance
- Cable & Internet
- Auto Loans
- Investments
- Credit Cards
- Subscriptions
- Charity Donations
- Gym/Club Memberships

Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone:

Please discontinue my automatic withdrawal from the following account:

Financial Institution:

Account #

Routing #

Place an X next to your desired option:

Checking Account

Savings Account

Please make all future automatic withdrawals from the following account:

Financial Institution:

Harbor Pointe Credit Union

Account #

Routing #

291973687

Place an X next to your desired option:

Checking Account

Savings Account

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature:

Date:

Name:

Address:

City, State, Zip:

Phone:

SWITCH KIT

Harbor Pointe Credit Union Switch Kit Account Closure Authorization

You can authorize your remaining balance to be deposited automatically to your new Harbor Pointe Credit Union account(s) or paid by a check forwarded to your mailing address.

Fill out this form and send this form to your former financial institution for the accounts you are closing. Be sure to verify any outstanding items have cleared your old account.

Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution: _____
Address: _____
City, State, Zip: _____

Please Close My Account:

Account #: _____
Primary Owner: _____
Address: _____
City, State, Zip: _____

Please Send the Remaining Balance To:

Place an X next to your desired option:

Please deposit directly to my account at Harbor Pointe Credit Union.

Account # _____ Routing # 291973687

Checking Account Savings Account

Please forward me a check to my address listed below.

Primary Signature: _____
Date: _____
Joint Signature: _____
Name: _____
Address: _____
City, State, Zip: _____
Phone: _____

Thank you!

We are proud to welcome you to Harbor Pointe Credit Union and look forward to helping you discover the local difference!

Call Us Today

218-722-9294

Toll Free
800-376-3828

Email Us
hpcu@hpcu.us



Harbor Pointe
CREDIT UNION

Federally Insured by
NCUA EQUAL HOUSING LENDER