



Switch Kit to move your Checking Account to Direct Federal

Follow these three simple steps to switch your Checking to Direct Federal:

1. Close your old account

Start the transition away from your account at your former institution. You'll want to leave sufficient funds there long enough for outstanding transactions to clear. Once you've verified that your last checks, direct deposits and automatic payments have been posted, you will want to close it out completely.

Complete the **Authorization to Close Account** at another Financial Institution

2. Transfer your Direct Deposits & Automatic Payments

Use this form to notify your employer (or other source) to begin placing deposits in your new account.

Complete the **Authorization to Switch to Direct Deposit***

3. Automatic Payments Change Request*

This form is to be sent to each of your automatic payment vendors (utilities, mortgage, insurance, etc.), notifying them to start using your Direct Federal account. You may want to check and see if you can have these payments made through Direct's free Bill Pay service.

Complete the Authorization to **Redirect Automatic Payments**

*The forms we are providing you are generic. An employer/merchant may require a separate form or other documentation.

Switching in three simple steps gives you the ability to enjoy the advantages of Direct Federal. If you have any questions along the way, call our Member Services Department at 1-800-676-0001.



Authorization to Close Account

Complete and submit this form to your current financial institution authorizing them to close your account with them and direct your balance to your Direct Federal Credit Union Account.

To:

Previous Financial institution

Address

City

State

Zip

From:

Your Name

Address

City

State

Zip

Savings

Checking

Account Number

Regarding:

Account closing

New Financial
Institution
Information

Future payments will come from:

Direct Federal Credit Union

Routing Number: 2113-8178-3

50 Cabot Street

Account Number: _____

Needham, MA 02494-9123

Account Type: Savings Checking

781-455-6500

Make check payable to Direct Federal Credit Union for The Benefit Of:

Member name

Signature

Date

Joint Signature

Date

Thank you for your assistance in making this change.



Authorization to Switch to Direct Deposit

Complete and submit this form to your employer/payroll department to authorize direct deposit into your Direct Federal Credit Union Account. *Please note some employers/departments may require you to fill out additional forms.*

To

EMPLOYER OR DEPARTMENT

ADDRESS

CITY

STATE

ZIP

From

YOUR NAME

Regarding

Change Direct Deposit

New Financial
Institution Information

Effective immediately, please transfer my direct deposit to my new account at:

Direct Federal Credit Union
50 Cabot St, PO Box 9123
Needham, MA 02494-9123
781.455.6500

Routing (ABA) Number: 2113-8178-3
Account Number: _____

Please disperse my Direct Deposit as Follows:

Savings Amount: \$ _____ or Net Check

Checking Amount: \$ _____ or Net Check

I hereby authorize my direct deposit to be sent to my account at Direct Federal Credit Union. Thank you for your assistance in making this change.

SIGNATURE

DATE

SOCIAL SECURITY NUMBER

DAYTIME PHONE



Redirect Automatic Payments

Complete the following and forward to any/all creditor(s) (i.e. fitness center, utilities, etc.) that may be deducting payments from your current account. *Please note you may be required to complete additional forms from your creditor.*

To

COMPANY NAME

ADDRESS

CITY

STATE

ZIP

From

YOUR NAME

YOU ARE CURRENTLY WITHDRAWING (\$)

FOR PAYMENT ON MY ACCOUNT NUMBER

FROM MY ACCOUNT NUMBER

AT MY OLD FINANCIAL INSTITUTION

ADDRESS

CITY

STATE

ZIP

Regarding

Transfer of Automatic Payment

New Financial
Institution Information

Future payments will come from:

Direct Federal Credit Union

50 Cabot St, PO Box 9123

Needham, MA 02494-9123

781.455.6500

Routing (ABA) Number: 2113-8178-3

Account Number: _____

I hereby authorize you to redirect automated payment withdrawals from my account at Direct Federal Credit Union. Thank you for your assistance in making this change.

MEMBER NAME

DAYTIME PHONE NUMBER

SIGNATURE

DATE

JOINT SIGNATURE

DATE