

## **Make the move in three easy steps to... Sunset Science Park Federal Credit Union**

Choosing the right financial institution can be confusing, but moving to Sunset Science Park F.C.U. is easy. If you have any questions, feel free to give us a call...we'd be happy to help!

### ***Step 1: Getting Started***

- ◆ Open your new account at Sunset Science Park F.C.U.
- ◆ Write down your account number in the space provided on the forms ~ you'll need your account number and routing number later.
- ◆ Contact Sunset Science Park F.C.U. regarding check styles, ATM/Visa Debit Cards and you're ready to go.

### ***Step 2: Move Transactions to your new account***

- ◆ Verify that all checks or automatic withdrawals have cleared your previous account. These transactions might take a few weeks, so leave enough money in your previous account to cover them.
- ◆ Destroy ATM/Debit Card, deposits slips and checks from your previous account. (For security, we can shred them here for you if you'd like).
- ◆ Notify anyone who makes automatic withdrawals from your account that you have moved to Sunset Science Park F.C.U. ie.) Mortgage loans, Insurance premiums, Gym Dues, Internet Services, Cell Phone payments, etc. Now that you have moved, they will need your new account and routing number for any automatic withdrawals you would like to set up. For your convenience, we have enclosed a form to help you initiate the process. We have a variety of automated services designed for you and would be happy to set you up with the one that fits you best. If you're interested in paying your bills whenever you'd like, ask us about our Bill Pay Service and how you can use it for **FREE**.
- ◆ Tell your employer to change your direct deposit to Sunset Science Park F.C.U. For your convenience, we have enclosed a form to help you in this process. We can even help you complete it. Be sure to contact anyone else who does deposits to your account ie.) Retirement, Pension, Social Security, etc.

### ***Step 3: Close Your Old Account***

- ◆ Tell your previous financial institution to close your account and request a check for the balance. Make sure all outstanding transactions on that account has cleared (we've provided a form for this too).

You've just made the move to a better checking account! Welcome to Sunset Science Park Federal Credit Union.

***What makes us different...Makes us Better!***

# Change Automatic Payment

- ◆ Date: \_\_\_\_\_
- ◆ Company Name: \_\_\_\_\_
- ◆ Mailing Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

To Whom it May Concern:

You are currently withdrawing \_\_\_\_\_ (amount) for my \_\_\_\_\_ (what payment is for), \_\_\_\_\_ (account number), on \_\_\_\_\_ (when) from the following account:

- ◆ Old Financial Institution: \_\_\_\_\_
- ◆ Routing Number: \_\_\_\_\_
- ◆ Account Number: \_\_\_\_\_

Please redirect automatic withdrawals to my new account:

- ◆ New Financial Institution: **Sunset Science Park FCU**
- ◆ Routing Number: **323075220**
- ◆ Account Number: \_\_\_\_\_
- ◆ Signature: \_\_\_\_\_
- ◆ Name (Please Print): \_\_\_\_\_
- ◆ Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

If you have any questions about this request, please contact me during the day/evening (circle one) at:

( ) \_\_\_\_\_ Thank You.

Mail the completed form to the company who is withdrawing funds for the above recurring payment.



# Change Payroll Direct Deposit

To switch your Direct Deposit to SSPFCU, simply complete this form and give to your employer.

- ◆ Date: \_\_\_\_\_
- ◆ Employer: \_\_\_\_\_
- ◆ Mailing Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

To Whom it May Concern:

You are currently depositing: \_\_\_my entire paycheck \_\_\_part of my paycheck to the following account:

- ◆ Current Financial Institution: \_\_\_\_\_
- ◆ Financial Institution Routing Number: \_\_\_\_\_
- ◆ Account Number: \_\_\_\_\_

Please re-direct my deposit to **Sunset Science Park F.C.U.**

- ◆ Financial Institution Routing Number: **323075220**
- ◆ Account Number: \_\_\_\_\_
- ◆ Savings \_\_\_ Checking \_\_\_
- ◆ Signature: \_\_\_\_\_
- ◆ Name (Please Print): \_\_\_\_\_
- ◆ Mailing Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

For Payroll Dept: If you have any questions, please contact ACH Dept at  
(503) 643-1335.



# Close Account

- ◆ Date: \_\_\_\_\_
- ◆ Financial Institution: \_\_\_\_\_
- ◆ Mailing Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

To Whom it May Concern:

Please close my account \_\_\_\_\_ and send a check for the remaining balance to me at the address below. If you have any questions about this request, please contact me at:

Daytime: ( ) \_\_\_\_\_ Evening: ( ) \_\_\_\_\_

Sincerely,

- ◆ Signature: \_\_\_\_\_ Joint Signature: \_\_\_\_\_
- ◆ Name (Please Print): \_\_\_\_\_ Joint: \_\_\_\_\_
- ◆ Mailing Address: \_\_\_\_\_
- ◆ City, State & Zip: \_\_\_\_\_

Mail the completed form to your old financial institution.

