

## Switch Kit – “To Do” List

We will make it quick - and easy - to switch your accounts to Patriot Equity Credit Union. Simply use this handy “to do” checklist to help you make the switch!

1. Have your new Patriot Equity Credit Union account number(s) ready when completing the authorization forms in the switch kit:

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

**Routing Number: 284383954**

2. Switch direct deposits/automatic deposits using the **Authorization to Change Direct Deposit:**

- |   |  |
|---|--|
| <input type="checkbox"/> Employer Deposit               | <input type="checkbox"/> Brokerage Deposit                       |
| <input type="checkbox"/> Government Deposit             | <input type="checkbox"/> Child Support or Court-Ordered Deposits |
| <input type="checkbox"/> Social Security Administration | <input type="checkbox"/> Other                                   |

3. Switch automatic payments/withdrawals using the **Authorization to Change Automatic Withdrawal:**

- |  |   |
|--|---|
| <input type="checkbox"/> Mortgage/Rent                   | <input type="checkbox"/> Auto                 |
| <input type="checkbox"/> Association Fees                | <input type="checkbox"/> Club/Membership Dues |
| <input type="checkbox"/> Internet Service                | <input type="checkbox"/> Cable TV/Satellite   |
| <input type="checkbox"/> Investments                     | <input type="checkbox"/> Credit Cards         |
| <input type="checkbox"/> Utilities: Electric, Gas, Water | <input type="checkbox"/> Phone/Cell Phone     |
| <input type="checkbox"/> Online billing                  | <input type="checkbox"/> Other                |

4. Close other savings, checking, bill payment accounts using the **Authorization to Close Account:**  
Financial Institutions: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

5. Transfer high-rate credit card balances to your Patriot Equity Credit Union Visa using the **Balance Transfer Authorization:**

Credit Cards to Transfer: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6. Additional Options to Explore:

- Refinance your auto loan at Patriot Equity Credit Union
- Refinance your mortgage loan at Patriot Equity Credit Union
- Inquire about Patriot Equity Credit Union’s Home Equity services

For additional detail – or help switching your accounts to Patriot Equity Credit Union – just ask us! We’ll be glad to help. Please visit either branch office or call 731-668-1155.