



# SWITCH KIT!

***Switching your account to Heritage Credit Union is fast and easy. We'll give you everything you need to get started. Simply follow the steps below:***

## ***Step 1: Open a new Heritage Credit Union account***

Please stop in one of our branch locations to open an account. Bring with you the following items:

1. Social security number or tax identification number
2. Two forms of identification (one needs to be a picture ID)
3. \$25 to open your first Share Account

## ***Step 2: Stop using your old checking account***

Stop writing checks from your old account and let the last of your old checks that you have written clear. This could take up to ten days. Destroy any unused checks, old ATM and debit cards.

## ***Step 3: Fill out and deliver these forms***

The form to close your account should be mailed or delivered to your current financial institution to close your checking account. If you have direct deposit at work, fill out the form to change/start my direct deposit. If you have automatic payments coming out of your checking account (ie. mortgage, insurance, loan payments), fill out the change my automatic payments form. Include all merchants or service providers that use your old account number or debit card number and any online automated payment accounts.

### **WISCONSIN**

#### **Chetek**

1502 Hwy Blvd. N.  
Chetek, WI 54728  
715-924-2415  
FAX: 715-924-2486

#### **Ladysmith**

701 W. Miner Ave.  
Ladysmith, WI 54848  
715-532-7731  
FAX: 715-532-9686

#### **Prairie du Sac**

1170 Prairie St.  
Prairie du Sac, WI 53578  
608-644-8100  
FAX: 608-644-8101

#### **Madison**

2555 Shopko Dr.  
Madison, WI 53704  
608-241-2191  
FAX: 608-240-1568

#### **Sauk City**

827 Phillips Blvd.  
Sauk City, WI 53583  
608-643-2600  
FAX: 608-643-2667

#### **Milwaukee**

225 W. Greenfield Ave  
Milwaukee, WI 53204  
414-645-5160  
FAX: 414-645-1523

### **ILLINOIS**

#### **Galesburg**

1980 National Blvd.  
Galesburg, IL 61401  
309-344-2001  
FAX: 309-344-2203

#### **Rockford**

5959 E. State St.  
Rockford, IL 61108  
815-229-7000  
FAX: 815-229-0136

# Please close my account



Use this form to contact your existing financial institutions where you are closing accounts once all checks or automatic payments have cleared.

\_\_\_\_\_

Date

\_\_\_\_\_

Bank or Credit Union Name

\_\_\_\_\_

Bank or Credit Union Address

\_\_\_\_\_

City, State, Zip

*Effective \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_, please close the following accounts:  
checking account # \_\_\_\_\_, savings account # \_\_\_\_\_.  
I would like a check sent to me with the remaining balance to the address below. Thank you.*

\_\_\_\_\_

Primary Member Signature

\_\_\_\_\_

Name (print)

Daytime Phone

\_\_\_\_\_

Address

\_\_\_\_\_

City, State, Zip

\_\_\_\_\_

Secondary Member Signature

\_\_\_\_\_

Name (print)

Daytime Phone

\_\_\_\_\_

Address

\_\_\_\_\_

City, State, Zip

# Please change/start my Direct Deposit



Use this form to contact your employer's human resources department, the company handling your retirement or pension payments, government and/or your social security administrator.

Employer Name

Employer Address

Use this portion for **change** only

Effective \_\_\_\_/\_\_\_\_/\_\_\_\_, please stop processing my direct deposit with:

Previous Bank or Credit Union

Routing Number

Account Number

Effective \_\_\_\_/\_\_\_\_/\_\_\_\_, start using my/our new Heritage Credit Union account for processing my payroll direct deposit.

Heritage Credit Union

1212 Huxley Street, Madison, WI 53704

Routing Number: 2759-7898-3 (you may attach a copy of a VOIDED check)

Type of account:  Checking Account Number \_\_\_\_\_  Savings Account Number \_\_\_\_\_

*If you have any questions, please let us know. Thank you.*

*This Authority is to remain in full force and effect until Company has received written notification from me of its termination in such time and in such manner as to afford Company and Depository a reasonable time to act on it. I understand that the authorization may be turned down or terminated at any time.*

Primary Member Signature

Name (print)

Social Security Number or Employee Number

Date

Address

Daytime Phone

City, State, Zip

ATTACH YOUR NEW HCU VOIDED CHECK HERE

# Please change my Automatic Payment Account



Use this form for anyone who makes automatic withdrawals from your account.

- |   |  |
|---|--|
| <input type="checkbox"/> Mortgage             | <input type="checkbox"/> Auto Loan or Lease              |
| <input type="checkbox"/> Home Equity          | <input type="checkbox"/> Insurance (health, life or car) |
| <input type="checkbox"/> Gas/Electric         | <input type="checkbox"/> Cable Account                   |
| <input type="checkbox"/> Phone                | <input type="checkbox"/> Internet Service Provider       |
| <input type="checkbox"/> Cell Phone           | <input type="checkbox"/> Safe Deposit Box Rental         |
| <input type="checkbox"/> Credit Cards         | <input type="checkbox"/> Health Club                     |
| <input type="checkbox"/> Investment/Annuities | <input type="checkbox"/> Charitable Contributions        |

\_\_\_\_\_  
Company Name

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

Effective \_\_\_\_/\_\_\_\_/\_\_\_\_, please stop processing automatic deduction with:

\_\_\_\_\_  
Previous Bank or Credit Union

\_\_\_\_\_  
Routing Number

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

\_\_\_\_\_  
Withdrawal Amount

Effective \_\_\_\_/\_\_\_\_/\_\_\_\_, start using my/our new Heritage Credit Union account.

Heritage Credit Union

1212 Huxley Street, Madison, WI 53704

Routing Number: 2759-7898-3 (you may attach a VOIDED check)

Type of account  Checking Account Number \_\_\_\_\_  Savings Account Number \_\_\_\_\_

*If you have any questions, please let us know. Thank you.*

\_\_\_\_\_  
Primary Member Signature

\_\_\_\_\_  
Name (print)

\_\_\_\_\_  
Daytime Phone

\_\_\_\_\_  
Secondary Member Signature

\_\_\_\_\_  
Name (print)

\_\_\_\_\_  
Daytime Phone

ATTACH YOUR NEW HCU VOIDED CHECK HERE