



HERITAGE
credit union

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. \$5 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
PO Box 85
Chetek, WI 54728
715-924-2415

Hawkins

625 Ellingson Ave
PO Box 77
Hawkins, WI 54530
715-585-7709

Ladysmith

701 W Miner Ave
Ladysmith, WI 54848
715-532-7731

Madison

2555 Shopko Dr
Madison, WI 53704
608-241-2191

Milwaukee

225 W Greenfield Ave
Milwaukee, WI 53204
414-645-5160

Phillips

114 S Avon Ave
Phillips, WI 54555
715-339-3052

Sauk City

827 Phillips Blvd
Sauk City, WI 53583
608-643-2600

Truax (Military Personnel)

2625 Sloan Blvd
Madison, WI 53704
608-244-7704

ILLINOIS

Galesburg

1980 National Blvd
Galesburg, IL 61401
309-344-2001

Machesney Park

7144 N Perryville Rd
Machesney Park, IL 61115
815-316-6280

Rockford

5959 E State St
Rockford, IL 61108
815-229-7000

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 HERITAGE VOIDED CHECK HERE



Please change my Automatic Payment Account

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

- Mortgage
- Home Equity
- Gas/Electric
- Phone
- Cell Phone
- Credit Cards
- Investment/Annuities
- Auto Loan or Lease
- Insurance (health, life or car)
- Cable Account
- Internet Service Provider
- Safe Deposit Box Rental
- Health Club
- 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 HERITAGE VOIDED CHECK HERE