

Switching is easier *here*.

We know that switching your checking account from *there* to *here* can be time consuming, so we've put together this switch kit to make it as easy as possible. Just follow these simple guidelines and complete the attached forms to:

- Switch Your Direct Deposits
- Switch Your Automatic Payments
- Close Your Old Account

Switching Direct Deposits

To begin or transfer direct deposits, the following information is needed:

- Employer or deposit initiator's name and address
- Bethpage account number
- Bethpage ACH routing/transit number: 221473652

Typical sources for direct deposit include:

- Employer's human resource department
- Company handling your retirement/pension
- Social Security Administration

Complete the attached "**Direct Deposit Request Form**" form for each organization. Need help? Just stop by any Bethpage branch office and we will be happy to complete and mail the form for you.

Switching Automatic Withdrawals

Do you have automatic withdrawals or payments made from your old account? This could include payments to:

- Insurance companies (Auto, Home, Life)
- Utility companies
- Telephone (Home, Cell)
- Student Loans
- Credit Cards

To have these payments made from your new Bethpage account, complete the attached "**Automatic Payment Request Form**" for each payee.

1-800-628-7070

www.bethpagefcu.com

Transferring Online Banking Payees

Do you use your old bank to pay any bills online via their website? If you do, you'll want to sign up for Bethpage Online Banking and Bill Pay.

- Log on to your old bank's online banking site and select the option to view your payees
- Print the details to use when you set up your Bethpage Bill Pay service
- Cancel recurring payments from your old bank to avoid paying a bill twice

Closing Your Old Account

First, stop using your old checking account, but keep enough funds in it to cover any outstanding checks, automatic withdrawals, and automatic payments.

Then verify that your last check, automatic withdrawal, and automatic payment has cleared. Once they have you are ready to close your old account by completing the attached **“Close Account Request Form.”**

Need help? Just visit any Bethpage branch office and we will be happy to complete the switch kit forms for you. We'll even mail them for you, free of charge.

If you have any questions, please don't hesitate to call our member service line at 1-800-628-7070.

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Close Account Request Form

Other Financial Institution Name

Address

City

State

Zip

To Whom It May Concern:

Please accept this letter as authorization to close account # _____ at your institution and send a check for the remaining balance to my address below. If you have questions, please contact me at _____.

I understand that I will need to verify that all outstanding payments and deposits have cleared before the account is closed. I have already made arrangements to switch any automatic debits and deposits I have associated with this account.

Thank you.

Owner Signature

Printed Name

Date

Joint Owner Signature

Printed Name

Date

1-800-628-7070

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Mailing Address

Name: _____

Address: _____
