

Crescent Credit Union
EASY SWITCH KIT

If you don't know what to expect, change can be difficult, confusing and complicated. We have prepared this "Easy Switch Kit" to assist you in switching your account to Crescent Credit Union. Although you may still have to do some work and complete some forms to change your present relationship, we can help you get through it. (Page 2 can help you get organized.)

Here are some things you will need to know:

- | | |
|---------------------------|--------------------------------------|
| • Our Name | Crescent Credit Union |
| • Our Address | PO Box 4290, Brockton, MA 02303-4290 |
| • Our Routing Number | 211381437 |
| • Our Telephone Number | 800-894-4445 |
| • Your CCU Account Number | _____ |

If you have Direct Deposit of your Social Security payment:

- You can call them at 1-800-772-1213 and they will take your information over the telephone
- or**
- We can place the call for you from our office. They will want to talk with you directly to make sure of your instructions.

HINT: It can take up to three weeks for the change to be made, so you may want to time your request just after you receive your payment.

If you have an Automatic (Debit) Payment taken from your account:

- Complete the form enclosed (page 3) and send it to the place that takes the automatic payment. *

If you have Direct Deposit of your paycheck:

- Complete the form enclosed (page 4) and send it to the Human Resource Department where you work. *

If you receive Direct Deposit of any other kind of payment:

- Complete the form enclosed (page 4) and send it to the place you receive the payment from. *

If you want to close your account at another financial institution:

- Complete the form enclosed (page 5) and send it to the institution where you currently have your account. *

*You may be asked to complete an "official" form but at least you will have all the information you will need. Some even require a voided check. You may have to supply the old information as well.

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Account Relationships

Present Banking Relationship _____

I have the following accounts at my present bank:

Checking Account

ACCOUNT NUMBER: _____

NAME (S) ON ACCOUNT: _____

FEATURES: (check card, direct deposit, transfers, on-line banking, bill pay etc.)

Money Market Accounts

ACCOUNT NUMBER: _____

NAME (S) ON ACCOUNT: _____

FEATURES: _____

Savings Accounts

ACCOUNT NUMBER: _____

NAME (S) ON ACCOUNT: _____

FEATURES: _____

Certificates of Deposit

ACCOUNT NUMBER: _____

NAME (S) ON ACCOUNT: _____

FEATURES: _____

