



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. \$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

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

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