



## CREDIT UNION SWITCH KIT

**Follow these easy steps to transfer your accounts to USAgencies Credit Union.**

### **1. Open Your New Checking Account**

Call a Member Relationship Specialist today at (503)275-0300 or 1(800)452-0915, option 2. They'll get the process started for you! – OR – establish your account online at [www.usacu.org](http://www.usacu.org). A Member Relationship Specialist will then follow up with you to help you through the process.

### **2. Ask Your Employer to Reroute Your Direct Deposit**

When you open your new checking account we will give you your account number and our routing number to make it easy for your employer to start your Direct Deposit. Enclosed is a "Direct Deposit Authorization" for you to provide your employer. If they require a check to get your direct deposit started we can help you with that as well.

### **3. Sign up for our Lifestyle Line of Credit**

Having a Lifestyle line of credit will offer you peace of mind while you're transitioning your account. It serves as overdraft protection – so if there is a delay in your direct deposit, you can rest easy that any bills you choose to pay will be covered. Talk to your Member Relationship Specialist, or contact our Lending Department directly at (503) 275-0300 or 1 (800) 452-0915, option 3.

### **4. Get Connected**

If you haven't already done so, sign up for our Online Banking and download our mobile app for your smartphone by searching for "USAgencies credit union" in the app store. This will help you keep track of your account as you are transitioning and moving payments.

### **5. Set-up Bill Pay for Your New Account**

If you like to pay bills online, set up your payments in our free Online Bill Pay. Use the enclosed "Bill Pay Worksheet" to make this process even easier.

### **6. Contact Companies that Direct-Debit Your Account**

Make note of what businesses you may have authorized to directly debit your account. Contact them and let them know your new account information or enter their information into Bill Pay. An "Automatic Payment Change Form" to assist in this process has been included in this kit.

### **7. What you can expect:**

Within 7 – 10 days of opening your account, your new debit card will arrive too! You can order checks (if you need them) and also apply for a credit card too – all at [www.usacu.org](http://www.usacu.org) or over the phone with your Member Relationship Specialist. A Member Relationship Specialist will be keeping in close contact with you to ensure the transition to your new checking account is smooth.

### **8. Close Your Old Account**

Once you have started receiving direct deposits into your new account and are sure that there are no outstanding checks or automatic debits that need to clear, close your old account.

**9. Enjoy your new USAgencies Credit Union Relationship and share the news with co-workers and family members – they may want to join the USACU family too.**



DIRECT DEPOSIT AUTHORIZATION

Please complete and return to your HR or payroll representative.

PERSONAL INFORMATION

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Line 2: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Employee Number or Social Security Number: \_\_\_\_\_

ACCOUNT AND DEPOSIT INFORMATION

USAgencies Routing Number: **323075806**

Account Number: \_\_\_\_\_  Checking  Savings

Amount:  Entire Pay

% of Pay \_\_\_\_\_%

Specific Dollar Amount: \$ \_\_\_\_\_

AUTHORIZATION

I hereby authorize my employer to initiate credits/deposits to the above account at USAgencies Credit Union on a recurring basis until I notify in writing that I wish to cancel this authorization.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_



## BILL PAY WORKSHEET

Use this worksheet to streamline the process of switching your current online bill payments to your new USAgencies Credit Union Bill Pay.

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Payee: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Account Description: \_\_\_\_\_ Due Date: \_\_\_\_\_

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Payee: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Account Description: \_\_\_\_\_ Due Date: \_\_\_\_\_

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Payee: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Account Description: \_\_\_\_\_ Due Date: \_\_\_\_\_

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Payee: \_\_\_\_\_ Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Account Number: \_\_\_\_\_

Account Description: \_\_\_\_\_ Due Date: \_\_\_\_\_

\*\*This worksheet is for personal use only and serves as a helpful tool in switching bill pay systems.



AUTOMATIC PAYMENT CHANGE FORM

**Please update payment instructions per the information below:**

Company or Payee: \_\_\_\_\_

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

Company Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Payment Amount: \_\_\_\_\_ Frequency:  Monthly  Bi-weekly  Weekly

Effective Date: \_\_\_\_\_

Please change payment to debit from: USAgencies Credit Union  
95 SW Taylor Street  
Portland, OR 97204

Account Info:

USAgencies Routing Number: **323075806**

Account Number: \_\_\_\_\_  Checking  Savings

I authorize the above Company/Payee to update my automatic payments per these instructions:

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_