

# SWITCH

# KIT

Making the switch to MHV as easy as possible.

**Mid-Hudson Valley Federal Credit Union**

P.O. Box 1429

Kingston, NY 12402

Phone: 800.451.8373

Routing Number (ABA): 221976243



# SWITCHKIT

Making the switch to MHV as easy as possible.

**Interested in switching your accounts to MHV, but not sure how to get started?** That's why we've developed the MHV Switch Kit, a step-by-step checklist to help make your transition to a new MHV checking account quick and easy. Just follow the simple steps to get started.

If we can be of any assistance throughout the transition, please visit any of our branch locations or contact our Call Center at **800.451.8373**. Thank you for choosing MHV. We value and appreciate your business!

## 1) Open an MHV Checking account.

- Stop in to any MHV Branch Location and speak with a one of our Member Service Representatives. (Use the ATM & Branch Locator on our Website, [www.MHVFCU.com](http://www.MHVFCU.com) to locate the nearest branch.)

## 2) Sign up for MHV Home Banking and E-Statements.

- Easily track your direct deposits, automatic withdrawals or payments, and checks as they clear. To sign up for home banking, visit [MHVFCU.com](http://MHVFCU.com) and click on Sign Up for Home Banking.

## 3) Stop using your former account and begin using your new MHV Checking account as soon as possible.

Be sure to leave sufficient funds in your former account until all of your checks have cleared and any automatic withdrawals have been successfully transferred to your new MHV checking account.

## 4) Change your Direct Deposits.

- Use our attached Direct Deposit Authorization Change Form to change any direct deposits. Remember to attach a voided MHV check to this form.

## 5) Change your Automatic Payments or Withdrawals.

- Use our attached Automatic Payment or Withdrawal Authorization Change Form to change any automatic payments or withdrawals to MHV.
- If you were using online Bill Payment, don't forget to print a list of your current payees and your payment history. MHV Bill Pay can handle all of your recurring and one-time online bill payment needs.

## 6) Close your former account at the other institution.

- Use our attached Account Closing Form to close your account at the other banking institution.
- Once you close your account at the other institution, remember to shred or destroy any old checks for security purposes.

### Routing and Account Numbers...

#### How to find them:

1. The bank's routing number is the 9-digit number located in the bottom left corner of your check.
2. Your account number is the set of numbers appearing just after the routing number or to the left of the check sequence number. Although your Account Number may contain spaces and symbols, do not type them.

YOUR FINANCIAL INSTITUTION  
ANYTOWN, USA

FOR \_\_\_\_\_

① 1234568902A d12345698 0101

②



MID-HUDSON VALLEY FEDERAL CREDIT UNION

# SWITCHKIT Making the switch to MHV as easy as possible.

Use this form to gather all of your auto pay and deposit information in one place for easy reference.

## Automatic Payment Checklist

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loans				
Insurance				
Credit Cards				
Gas/Oil				
Electric				
Cable/TV				
Telephone				
Cell Phone				
Water				
Trash Removal				
Internet Provider				
Health Club				
Investments				
IRA/Retirement				
Charities				
Daycare				
Tuition/School Expense				
Other				

## Direct Deposit Checklist

Payment	Company	Account Number	Amount	Date of Payment
Employee Payroll				
Pension(s)/Retirement Plans				
Social Security				
Investment Incomes				
Other				

## Helpful Phone Numbers and Web sites

Social Security Administration	800.772.1213	<a href="http://www.ssa.gov">www.ssa.gov</a>
Office of Personnel Management	888.767.6738	<a href="http://www.opm.gov">www.opm.gov</a>
Department of Veterans Affairs	877.838.2778 or 800.827.1000	<a href="http://www.va.gov">www.va.gov</a>

## Account Closing

Use this form to Close Your Account at another financial institution and request a check for the remaining balance.

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

To: \_\_\_\_\_ (Bank Name)  
\_\_\_\_\_ (Bank Address)  
\_\_\_\_\_ (City, State, Zip)

Primary Account Holder:  
\_\_\_\_\_ (Name)  
\_\_\_\_\_ (Home Address)  
\_\_\_\_\_ (City, State, Zip)

Secondary Account Holder:  
\_\_\_\_\_ (Name)  
\_\_\_\_\_ (Home Address)  
\_\_\_\_\_ (City, State, Zip)

**Note:**

If there are multiple accounts involved please complete a form for each account.

Verify all checks and payments have cleared prior to submitting this form to close your account.

Please accept this as my authorization and direction to close my account with your institution.

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

Checking  Savings  Certificate (CD)  Money Market (select one)

Please send the check in the amount of my account balance plus any accrued interest to my attention at the address on file.

If you should have any questions regarding this transaction please call me at my daytime phone number: \_\_\_\_\_.  
Thank you for your cooperation.

Sincerely,

\_\_\_\_\_  
(Customer Signature)

## Automatic Payment or Withdrawal Authorization Change Form

Use this form to change your Automatic Payments or Withdrawals to MHV (e.g. loan payment, insurance payment, transfers to brokerage accounts or savings accounts).

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

To: \_\_\_\_\_ (Company Name)  
\_\_\_\_\_ (Address of Company)  
\_\_\_\_\_ (City, State, Zip)

From: \_\_\_\_\_ (Name)  
\_\_\_\_\_ (Home Address)  
\_\_\_\_\_ (City, State, Zip)

**Note:**

If there are multiple payments involved please complete a form for each.

Please accept this letter as authorization to change the bank account information for automatic payments or withdrawals in the name of: \_\_\_\_\_, customer account number: \_\_\_\_\_, payment type: (i.e. Mortgage, Auto, Utilities, etc) \_\_\_\_\_, approximate amount of transfer \_\_\_\_\_.

I am aware that some automatic payments or withdrawals require advance notice of changes. Please include those notice periods when determining the new effective date.

Effective immediately, the new bank information is as follows:

Mid-Hudson Valley Federal Credit Union Account Number: \_\_\_\_\_

Checking  Savings  Certificate (CD)  Money Market (select one)

ABA Bank Routing Number: **221976243**

If you should have any questions regarding this transaction please call me on my daytime phone number: \_\_\_\_\_.  
Please send me written confirmation of when the change will be effective.

Thank you for your cooperation.

Sincerely,

\_\_\_\_\_  
(Customer Signature)

If available, attached is a voided check from my account.

## Direct Deposit Authorization Change Form

Use this form to change your direct deposit to MHV (payroll, dividends, royalties, etc)

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

To: \_\_\_\_\_ (Company/Employer Name)  
\_\_\_\_\_ (Address of Employer Company)  
\_\_\_\_\_ (City, State, Zip)

Primary Account Holder: \_\_\_\_\_ (Name)  
\_\_\_\_\_ (Home Address)  
\_\_\_\_\_ (City, State, Zip)

Secondary Account Holder: \_\_\_\_\_ (Name)  
\_\_\_\_\_ (Home Address)  
\_\_\_\_\_ (City, State, Zip)

**Note:**

If there are multiple accounts involved please complete a form for each account.

Contact your employer(s) concerning Direct Deposit changes

Verify your HR department does not require the use of their forms.

Please accept this letter as authorization to change the bank account information for direct deposit in the name of: \_\_\_\_\_, payment type: (i.e. Payroll, Pension/Retirement, Investment Income, other-please specify) \_\_\_\_\_.

I am aware that some automatic deposits require advance notice of changes. Please include those notice periods when determining the new effective date.

Effective immediately, the new bank information is as follows:

Mid-Hudson Valley Federal Credit Union Account Number: \_\_\_\_\_

Financial Institution Address: **PO Box 1429, Kingston, NY 12402**

Checking  Savings  Certificate (CD)  Money Market (select one)

ABA Bank Routing Number: **221976243**

If available, attached is a voided check from my account.

If you should have any questions regarding this change, please call me on my daytime phone number: \_\_\_\_\_.

Please send me written confirmation of when the change will be effective.

Thank you for your cooperation.

Sincerely,

\_\_\_\_\_  
(Customer Signature)

