

## STEP 1

### OPEN YOUR NEW ACCOUNTS

Come aboard (that is, if you haven't already). Once you open a SHARE SAVINGS account, you are an owner and member of Latitude 32™ Credit Union and will have access to the benefits of our extensive list of products and services. Stop in to either of our locations and join today!

## STEP 2

### STOP USING YOUR OLD ACCOUNTS

It's important to leave enough money in your former account to cover any outstanding checks or transactions. The process may take a few weeks, so you should immediately stop writing checks or using your ATM/debit card from your former institution.

## STEP 3

### SWITCH OVER YOUR AUTOMATIC TRANSACTIONS

In an effort to assist you with this process we have enclosed forms to use to contact the companies and financial institutions that may handle your automatic deposits or withdrawals.

USE THIS CHECKLIST TO KEEP TRACK OF WHO YOU MAY NEED TO CONTACT:

#### DIRECT DEPOSIT:

- ✓ Your employer's human resources/payroll department
- ✓ The company handling your retirement or pensions payments
- ✓ Social Security Administration

#### AUTOMATIC WITHDRAWALS FROM YOUR ACCOUNTS:

- ✓ Mortgage company
- ✓ Homeowners insurance
- ✓ Auto insurance
- ✓ Life insurance
- ✓ Loan payments
- ✓ Other: \_\_\_\_\_

#### AUTOMATIC CHARGES TO YOUR OLD DEBIT CARD:

- ✓ Utility companies
- ✓ Telephone company
- ✓ Cable company
- ✓ Internet Service Provider
- ✓ Memberships (gym, auto, etc.)
- ✓ Other: \_\_\_\_\_

## STEP 4

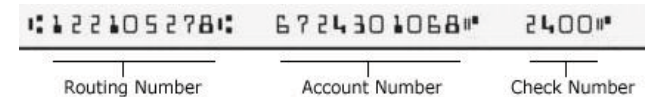
### CLOSE YOUR OLD ACCOUNTS

Use the enclosed "Close Accounts" form once your direct deposit and automatic drafts are changed to your Latitude 32™ accounts and that you're sure your old accounts outstanding checks have cleared. Mail the form to your old financial institution and destroy your old checks, ATM/debit cards and deposit slips.

### MAKE THE SWITCH

We've included notification forms to help make the switch easy. Use these to change your direct deposit, automatic withdrawals, and to close your old accounts. If you have any questions while completing these forms, just stop by any branch or give us a call at 843.566.4809.

\*Please note that you will need your new account number and routing number to complete the forms in this switch kit as well as your old account numbers. See the example below for help on locating the numbers on the bottom of your check.



\*Image represents the bottom left of a generic check



**LATITUDE 32™ CREDIT UNION**  
AS EASY AS 1.2.3.4 TO SWITCH

**CLOSE ACCOUNT**  
FOR YOUR OLD FINANCIAL INSTITUTION

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME OF FINANCIAL INSTITUTION

\_\_\_\_\_  
ADDRESS

\_\_\_\_\_  
CITY, STATE, ZIP

To whom it may concern:  
Please close my account(s):  
\_\_\_\_\_ (account numbers)  
and send a check for the remaining balance to:  
Mail the balance of my account to my home  
address

Mail the balance of my account to Latitude 32™  
Credit Union, Account # \_\_\_\_\_

TO: Latitude 32™ Credit Union  
1845 Sam Rittenberg Blvd.  
Charleston, SC 29407



If you have any questions about this request,  
please contact me during the DAY/EVENING  
(circle one) at \_\_\_\_\_

Thank you,  
Sincerely,  
\_\_\_\_\_  
(Signature)  
\_\_\_\_\_  
(Print Name)

\*Make extra copies as needed

**CHANGE PAYROLL/DIRECT DEPOSIT**  
FOR YOUR EMPLOYER

\_\_\_\_\_  
DATE

\_\_\_\_\_  
EMPLOYER/DEPOSITORS NAME

\_\_\_\_\_  
ADDRESS, CITY, STATE, ZIP

To whom it may concern:  
You are currently depositing MY ENTIRE  
PAYCHECK/PART OF MY PAYCHECK (circle one) into  
the following accounts:  
Previous Financial Institution:  
Routing Number:  
Account Number:

Please stop making deposits to that account and  
instead make them to:  
Latitude 32™ Credit Union  
1845 Sam Rittenberg Blvd., Charleston SC 29407  
Telephone: 843.556.4809  
Routing Number: 253278414  
Account Number: \_\_\_\_\_

If you have any questions about this request, please  
contact me during the DAY/EVENING (circle one) at  
\_\_\_\_\_.

Thank you,  
Sincerely,  
\_\_\_\_\_  
(Signature)  
\_\_\_\_\_  
(Print Name)  
\_\_\_\_\_  
(Address, City, State, Zip)  
\_\_\_\_\_  
(Other)

NOTE: For deposit other than payroll deposits such as retirement,  
contact the depositor for instructions on changing these deposits to  
your Lat 32™ account. To change your Social Security payments,  
please visit [www.ssa.gov](http://www.ssa.gov) or call 1.800.772.1213.

\*Make extra copies as needed

**CHANGE AUTOMATIC WITHDRAWAL**  
FOR ORGANIZATIONS WITHDRAWING FROM YOUR ACCOUNT

\_\_\_\_\_  
DATE

\_\_\_\_\_  
NAME OF COMPANY THAT MAKES WITHDRAWAL

\_\_\_\_\_  
ADDRESS, CITY, STATE, ZIP

To whom it may concern:  
You are currently withdrawing \$ \_\_\_\_\_ (amount)  
for my \_\_\_\_\_ (what payment is for).  
\_\_\_\_\_ (account number)  
\_\_\_\_\_ (when) from the following account:

Previous financial institution:  
Routing number:  
Account number:

Please stop making withdrawals from that account and  
instead make them from:  
Latitude 32™ Credit Union  
1845 Sam Rittenberg Blvd., Charleston SC 29407  
Telephone: 843.556.4809  
Routing Number: 253278414  
Account Number: \_\_\_\_\_

If you have any questions about this request, please  
contact me during the DAY/EVENING (circle one) at  
\_\_\_\_\_.

Thank you.  
Sincerely,  
\_\_\_\_\_  
(Signature)  
\_\_\_\_\_  
(Print Name)  
\_\_\_\_\_  
(Address, City, State, Zip)

\*Make copies of this form for each institution you need to notify.