

Automatic Payment Change/Transfer

When transferring your withdrawal(s), allow 30 days before your new automatic withdrawal takes effect. Upon completion, mail this form to the financial institution(s) or company(ies) currently drafting your account (i.e. Credit Card company, Mortgage holder, Utility company, Insurance company, etc.).

Company or Financial Institution

Complete Address

City, State, Zip

To Whom It May Concern,

You are currently withdrawing \$ _____ (dollar amount) for the payment of my _____ (Auto, Credit Card, Insurance) on _____ (Date of Withdrawal) from the account listed below:

Financial Institution: _____

Routing/Transit Number: _____

Account Number: _____

Please stop drafting the above account and begin drafting to the account listed below:

New Financial Institution: AppleTree Credit Union

Address: Member Services Department

11333 W. Greenfield Ave.

West Allis, WI 53214

Phone #: (414) 546-7800

AppleTree Routing #: **2750-8247-1**

Checking Account #: _____ (10 digits)

Savings Account #: _____ (4/5 digits)

If you have any questions regarding this request or require additional information, please contact me during the DAY/EVENING (circle one) at _____ (phone #).

Thank you for your assistance.

Sincerely,

Name (print)

Signature

Please contact us at 414-546-7800, or stop by one of our branches, if you have any questions about this or any of the forms.

Direct Deposit Change/Transfer

When transferring your Direct Deposit(s) allow 30 days before your new Direct Deposit will take effect. Your employer may require your Social Security Number or Employee ID Number. Please consult your Human Resources or Payroll Department for details. Once completed, give this form to your Human Resources or Payroll Department for processing.

Employer/Depositor Name

Complete Address

City, State, Zip

To Whom It May Concern,

You are currently depositing my ENTIRE PAYCHECK/PART OF MY PAYCHECK (circle one, indicate amount if part of paycheck) to the following account:

Financial Institution: _____

Routing/Transit Number: _____

Account Number: _____

Please stop depositing to the above account and begin depositing to the account listed below:

New Financial Institution: AppleTree Credit Union

Address: Member Services Department

11333 W. Greenfield Ave.

West Allis, WI 53214

Phone #: (414) 546-7800

AppleTree Routing #: **2750-8247-1**

Checking Account #: _____ (10 digits)

Savings Account #: _____ (4/5 digits)

If you have any questions regarding this request or require additional information, please contact me during the DAY/EVENING (circle one) at _____ (phone #).

Thank you for your assistance.

Sincerely,

Name (print)

Signature

Please contact us at 414-546-7800, or stop by one of our branches, if you have any questions about this or any of the forms.

Account Closing Notification

When closing your accounts, remember to keep enough funds on deposit for checks, automatic Withdrawals, direct deposits or ATM/VISA Check Card transactions that may be pending. Once all Outstanding transactions have been posted, mail this form to your financial institution for processing.

Financial Institution's Name

Complete Address

City, State, Zip

To Whom It May Concern,

Please close my account _____ (account #) and send a check for the remaining balance to me at the address listed below.

If you have any questions regarding this request, please contact me during the DAY/EVENING (circle one) at _____ (phone #).

Thank you for your assistance.

Sincerely,

Name (print)

Signature

Address

City, State, Zip

Co-Signer (please print)

Co-Signer Signature

Date

Please contact us at 414-546-7800, or stop by one of our branches, if you have any questions about this or any of the forms.

AppleTree Credit Union Products and Services

Regular Savings:

Open a savings account and start saving for whatever your goals may be!

Minimum Balance to Open: \$5.00 (\$100 to avoid \$5 monthly service fee)

Minimum Balance to Earn Dividends: \$500 (higher balances earn higher rates)

ChoiceChecking:

This no-minimum balance checking account along with the FlexCard gives you the freedom to use your money anytime, anywhere! You can waive the low monthly service fee by using your FlexCard 8 times a month by signing as Credit, OR by maintaining \$5,000 on deposit OR by maintaining \$5,000 in loans. You'll also earn dividends on a low daily balance!

Minimum Balance to Open: \$0

Minimum Balance to Earn Dividends: \$2,000

Money Market Fund:

Use AppleTree Credit Union's money market fund for higher returns and easy access. You can make withdrawals of \$300 or more and deposits of any amount, anytime you want. You can also purchase handy checks for easy withdrawals for a minimal fee!

Minimum Balance to Open: \$2,000

Minimum Balance to Earn Dividends: \$2,000

Certificates:

Deposit \$5,000 or more into one of our certificates and earn a competitive dividend rate. We offer certificates from 6 months to 5 years. Plus your certificate will renew automatically for added convenience! We also have youth certificates with a lower minimum deposit!

Minimum Balance to Open (for members 18+): \$5,000

Minimum Balance to Open (for members under 18): \$500

Home Equity Loans:

Use your home's equity to redesign your kitchen, to add a deck, or whatever you want...

You can get a fixed installment loan or a line-of-credit. With the line-of-credit, you will receive handy checks for easy withdrawals. There are no annual fees, and the interest may be tax deductible. See your tax advisor, then come to AppleTree for a home equity loan (you can even apply online at www.appletree.org).

New & Used Auto and Truck Loans:

Finance with us and save! We finance up to 125% of your new or used auto or truck financial value. Get pre-qualified before you shop for more purchasing power. Our rates are very competitive...check with us the next time you need an auto or truck loan!

PCExpress:

Access your account online 24-hours-a-day! You can check your transactions, transfer money, get statements and much more! You can also sign up to receive **E-Statements**, saving you time and the planet! It's all at www.appletree.org!

TellerExpress:

With TellerExpress, you can transfer money, inquire on deposits and cleared checks, find a loan payoff amount and much more! **Call 414.546.7808 anytime, day or night!**

Visit www.appletree.org to check out a complete list of AppleTree services.
Give us a call at 414.546.7800 or 262.896.8800 or stop by one of our two locations to start saving
with AppleTree Today!