

Switch Kit Worksheet: Switching Financial Institutions Made Easy!

The Switch Kit is a quick and easy way for you to change your accounts from a financial institution to AppleTree Credit Union. It is a free service AppleTree offers prospective members to make the transition simple and stress-free. The kit includes a list of information you will need to collect and provides a step-by-step guide to switching to AppleTree Credit Union. This worksheet is provided to assist you in gathering all of the information needed to fill out the Switch Kit documents. Once you have pulled together the required information, you are ready to move forward with the Switch Kit.

Below is what you will need to get started:

- **Your previous financial institution information:**

Financial Institution Name, Address, City, St., Zip Code

Name on Account

Account Number(s) with corresponding Type(s) of Accounts

- **A list of your automated debits (ACH):**

Collect all information on companies making electronic withdrawals from your account, including automatic debits (ACH) or automatic charges to your debit and/or credit card (as an AppleTree Credit Union member, you are eligible to apply for a FlexCard). Common uses of automatic debits include rent/mortgage, utilities, phone and cable bills.

- **A list of any Direct Deposits:**

Gather a list of any companies who regularly deposit funds into your account.

AppleTree Credit Union offers members Direct Deposit for a safe, simple and speedy way to close the gap between you and your paycheck. You can also have a portion of your check transferred to another AppleTree account or loan! Some common uses of Direct Deposit include payroll, taxes, or expense reimbursements.

- **Your NEW AppleTree Credit Union account number:**

Not an AppleTree member yet? Please stop by one of our two locations to open an account. You can also check us out online at www.appletree.org!

Questions?

Call us at 414.546.7800 or stop by either one of our two locations!

Other AppleTree Products to Consider Switching:

Certificates

IRAs

Check Cards

Loans

Previous Financial Institution Information

List your previous financial institution information.

FI Name/Address	Phone/Fax	Close Date/Account #
i.e. My Old Bank	1-555-555-5555	03-17-2009
987 Smith St. City, State Zip	555-5555	0000011111

FI Name/Address	Phone/Fax	Close Date/Account #

FI Name/Address	Phone/Fax	Close Date/Account #

FI Name/Address	Phone/Fax	Close Date/Account #

Previous Financial Institution Information

List the companies who regularly deposit funds into your account. If this account is jointly held with multiple direct deposits, a list is necessary for each direct deposit.

Depositor Name/Address	Phone/Fax	Amount
i.e. My Employers Name	555-555-5555	
987 Smith St. City, State Zip	555-555-5555	

Depositor Name/Address	Phone/Fax	Amount

Depositor Name/Address	Phone/Fax	Amount

Depositor Name/Address	Phone/Fax	Amount

Automated Debit List

List all automatic debits (ACH) that have periodic withdrawals to be taken from a checking or savings account or charged to a debit and/or credit card to pay bills (i.e. regular monthly payments including rent, mortgages, utilities, and etc.).

Payee/Address	Phone/Fax	Amount/Account #
i.e. Smith Properties	1-555-555-5555	\$50.00
987 Smith St. City, State Zip	555-5555	0000011111-018

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #

Payee/Address	Phone/Fax	Amount/Account #