



Switch Planner

Switch to First Castle and Switch to Royalty!

Use this complete Switch Planner to assist you with switching financial institutions. Need Assistance? Call (504) 862-2561 or come by and we'll help you with everything.

To Switch your Savings Account

- Open a savings account at First Castle.
- Complete an application for NetTeller and sign-up for E-Statements on-line.
- Send the Request to Close Account to your previous financial institution.

To Switch your Checking Account

- Open a savings and checking account at First Castle. Apply for a debit card and start using your *new* checks.
- Complete an application for NetTeller and Check Imaging, then sign-up for E-Statements on-line.
- Complete a Payroll Deposit Easy Change Letter and send it to your payroll department.
- Complete the Automatic Payments Easy Change Letter and send it to whom you have given permission to withdraw from your account.
- Stop using your prior checking account, but be sure to keep enough money in the account to cover any outstanding checks and drafts.
- Review your existing account to ensure all checks and automatic withdrawals have cleared.
- Send the Request to Close Account to your previous financial institution. Destroy all remaining checks, ATM, and debit cards.

Automatic Payments

Easy Change Letter



Company Name: _____

Address: _____

Re: Switching My Automatic Payments

Attention: Accounting/ACH Department

I have recently changed financial institutions and I would like to now have my automatic payments with your company changed to my Credit Union account.

Please immediately discontinue debiting the below referenced account and begin making automatic withdrawals from my new First Castle Federal Credit Union account.

If you have any questions regarding this request, please contact me by mail or call me at the number listed below.

Sincerely,

Authorized Signature

Date

Automatic Payment Information

Name: _____

Phone: _____

Address: _____

Amount Debited: _____
(Enter payment amount of Amount Due)

Previous Financial Information:

Institution: _____

Routing Number: _____

Account Number: _____

Payment For: _____

Date Payment is made: _____

New Financial Information:

Institution: First Castle Federal C.U.

Routing Number: 265075883

Account Number: _____

Payroll Deposit

Easy Change Letter



Company Name: _____

Address: _____

Re: Switching My Payroll Direct Deposit to a New Account

Attention: Payroll Department

I have recently changed financial institutions and I would like to update my direct deposit. Please discontinue my current deposit and begin making direct deposits into my new First Castle Federal Credit Union account.

If you have any questions regarding this request, please contact me by mail or call me at the number listed below.

Sincerely,

Authorized Signature

Date

Direct Deposit Information

Name: _____ Phone: _____

Address: _____ Employee Number: _____

_____ Social Security Number: _____

Previous Financial Information:

Institution: _____ Routing Number: _____

1st Account Number: _____ 1st Amount Deposited: _____

2nd Account Number: _____ 2nd Amount Deposited: _____
(if applicable) (if applicable)

New Financial Information:

Institution: First Castle Federal C.U. Routing Number: 265075883

Account Number: _____ Amount Deposited: _____

Direct Deposit

Easy Change Letter



Company Name: _____

Address: _____

Re: Switching My Automatic Payments

Attention: Accounting/ACH Department

I have recently changed financial institutions and I would like to now have my direct deposit with your company changed to my Credit Union account.

Please immediately discontinue crediting the below referenced account and begin making direct deposits into my new First Castle Federal Credit Union account.

If you have any questions regarding this request, please contact me by mail or call me at the number listed below.

Sincerely,

Authorized Signature

Date

Automatic Payment Information

Name: _____ Phone: _____

Address: _____ Amount Credited: _____
(Enter deposit amount)

Previous Financial Information:

Institution: _____ Routing Number: _____

Account Number: _____

Date Deposit is made: _____

New Financial Information:

Institution: First Castle Federal C.U.

Routing Number: 265075883

Account Number: _____

Request to Close Account



Financial Institution: _____

Address: _____

Re: Account Closure

Attention: Member Service/Account Closing Department

This letter is to request to have my accounts closed at your institution. Please close the following account(s) listed below and send a check for the remaining balance(s) to my address.

If you have any questions regarding this request, please contact me by mail or call me at the number listed below. Thank you in advance for your prompt attention to this matter.

Sincerely,

Authorized Signature

Date

Account Information

Name: _____ Phone: _____

Address: _____

Savings Account Number: _____

Checking Account Number: _____

Royal Member Checklist

Our Royal Rewards Relationship Pricing Program is our way of rewarding you, our members/owners, for allowing us to be your primary financial institution. Members earn points for services and/or for balances.

Points add up to better rates and free services including:

- .25% Rate Increase on all New Share Certificates with Terms of 12 Months & Over
- .50% Annual Percentage Rate Decrease on New Consumer Loans*
- Free ATM Withdrawals**
- Two FREE Money Orders or Cashier's Checks per Month

With only 4 points, you qualify as a "Royal Rewards Member" and begin to earn your just rewards. You will be able to see the points you have and what else is still available.

Services	Points
<input type="checkbox"/> E-Statements	1 Point
<input type="checkbox"/> Mortgage Loan	1 Point
<input type="checkbox"/> Active Checking Account	1 Point
<input type="checkbox"/> Active Debit Card	1 Point
<input type="checkbox"/> Direct Deposit or Payroll Deduction	1 Point
<input type="checkbox"/> Automobile Loan	1 Point
<input type="checkbox"/> Boat Loan	1 Point

Balances

Points are rewarded for Regular Savings, CD's, IRA's, or Money Market Account balances independently. Accounts cannot be combined to achieve higher totals to earn points. Balances are calculated by average monthly balance.

<input type="checkbox"/> \$25,000.00 to \$49,999.99	1 Point
<input type="checkbox"/> \$50,000.00 to \$74,999.99	2 Points
<input type="checkbox"/> \$75,000.00 to \$99,999.99	3 Points
<input type="checkbox"/> \$100,000.00 and over	4 Points

Your Total of Points

Limited to members 18 years and older. Must be a member in good standing to participate.

* Rate decreases will occur only on new loans excluding loans secured by shares, mortgage loans, and seasonal and/or special promotions. Existing FCFCU loans may not be refinanced to reflect a rate decrease.

**Free ATM withdrawals apply to waiver of FCFCU fees on all ATMs, as well as Hibernia fees on selected Hibernia ABBY ATM's. *Subject to Change.*