

ACCOUNT SWITCH KIT



WEBER STATE
CREDIT UNION
Rewarding Membership



ACCOUNT SWITCH KIT



IF YOU ARE CURRENTLY A MEMBER OF WEBER STATE CREDIT UNION, USE THE NEW SWITCH KIT TO TRANSFER YOUR CHECKING ACCOUNT FROM YOUR CURRENT INSTITUTION. IT'S AS EASY AS 1-2-3.

- 1- SIGN UP FOR WEBER STATE CREDIT UNION'S FREE CHECKING ACCOUNT (PAGE 1).
- 2- CLOSE YOUR EXISTING ACCOUNTS AT OTHER INSTITUTIONS (PAGE 2).
- 3- CHANGE YOUR DIRECT DEPOSIT AND AUTOMATIC WITHDRAWALS WITH YOUR EMPLOYER (PAGE 3).

STEP 1- WEBER STATE CREDIT UNION CHECKING ACCOUNT SIGN UP

WHAT TO DO: FIRST, MARK THE CHECK BOXES FOR THE SERVICES YOU WANT. SECOND, PROVIDE YOUR NAME AND ACCOUNT NUMBER. FINALLY, ADD ANY JOINT OWNERS TO THE ACCOUNT. WHEN YOU'RE FINISHED, SIGN AND DATE, THEN RETURN THIS COMPLETED FORM IN PERSON TO ANY WSCU BRANCH.

- FREE CHECKING-** FREE CHECKING INCLUDES UNLIMITED CHECK TRANSACTIONS, FREE ONLINE ACCOUNT ACCESS, FREE BILL PAY, FREE ONLINE CHECK VIEWING, AND NO MINIMUM BALANCE REQUIREMENTS.
- FREE VISA CHECK CARD-** THE FREE VISA CHECK CARD LETS YOU USE A VISA CARD INSTEAD OF CHECKS, EARNS YOU REWARD POINTS ON EVERY TRANSACTION, AND OFFERS FRAUD LIABILITY PROTECTION.
- OVERDRAFT PROTECTION-** OFFERS A LINE-OF-CREDIT TO PROTECT AGAINST RETURN CHECK FEES (CREDIT APPROVAL REQUIRED). LINE-OF-CREDIT REQUESTED \$ _____
- E-STATEMENTS-** FREE ELECTRONIC ACCOUNT STATEMENTS POSTED TO ONLINE BANKING ACCOUNT.

NAME _____ E-MAIL _____

WSCU ACCOUNT NUMBER _____

ADD A JOINT OWNER		
NAME [LAST, FIRST, MIDDLE]	SOCIAL SECURITY NUMBER	DATE OF BIRTH
STREET ADDRESS	CITY, STATE, ZIP	
HOME TELEPHONE	SECONDARY TELEPHONE	

CERTIFICATION OF TAXPAYER ID AND BACKUP WITHHOLDING: BY SIGNING BELOW, I CERTIFY, UNDER PENALTIES OF PERJURY, THAT (1) I AM A U.S. PERSON (INCLUDING A U.S. RESIDENT ALIEN), (2) THE SOCIAL SECURITY NUMBER (SSN)/ TAX PAYER IDENTIFICATION NUMBER (TIN) SHOWN IS MY/ THE CORRECT IDENTIFICATION NUMBER, AND (3) I AM NOT, UNLESS DESIGNATED BELOW, SUBJECT TO BACKUP WITHHOLDING BECAUSE I HAVE NOT BEEN NOTIFIED THAT I AM SUBJECT TO BACKUP WITHHOLDING AS A RESULT OF A FAILURE TO REPORT ALL DIVIDENDS OR INTEREST, OR BECAUSE THE IRS HAS NOTIFIED ME THAT I AM NO LONGER SUBJECT TO BACKUP WITHHOLDING.

I AM SUBJECT TO BACKUP WITHHOLDING

MEMBERSHIP AND ACCOUNT AGREEMENT:

- 1) THIS MEMBERSHIP AND ACCOUNT ARE SUBJECT TO APPLICABLE FEDERAL AND STATE LAW, THE ARTICLES OF INCORPORATION AND BYLAWS OF THE CREDIT UNION; AND THE POLICIES AND PROCEDURES OF THE CREDIT UNION, INCLUDING AMENDMENTS OR MODIFICATIONS.
- 2) CREDIT UNION MEMBERSHIP AND/OR SERVICE FEES STATED IN THE MEMBER HANDBOOK AND FEE SCHEDULE APPLY TO THIS ACCOUNT.
- 3) OWNERSHIP OF THIS ACCOUNT IS IN ACCORDANCE WITH UTAH CODE ANNOTATED 7-9-32 AND OTHER APPLICABLE LAW.
- 4) I AGREE MY MONTHLY ACCOUNT NOTIFICATIONS WILL BE GENERATED VIA ELECTRONIC STATEMENT. I UNDERSTAND I MUST NOTIFY CREDIT UNION STAFF IN ORDER TO RECEIVE PAPER STATEMENTS.
- 5) I AUTHORIZE WEBER STATE CREDIT UNION TO CREATE AN ONLINE ACCOUNT ACCESS PORTAL TO BE USED WITH THIS ACCOUNT
- 6) I ACKNOWLEDGE RECEIPT OF THE TRUTH IN SAVINGS DISCLOSURE AND MEMBERSHIP AGREEMENT. THIS MEMBERSHIP AND ACCOUNT ARE SUBJECT TO THE TERMS OF SAID MEMBERSHIP AGREEMENT, WHICH CAN BE AMENDED BY THE CREDIT UNION. I AUTHORIZE THE CREDIT UNION TO OBTAIN CREDIT REPORTS IN CONNECTION WITH THIS NEW ACCOUNT. THE INFORMATION DISCLOSED IN THIS APPLICATION IS TRUE AND ACCURATE TO THE BEST OF MY KNOWLEDGE.

THE USA PATRIOT ACT REQUIRES WEBER STATE FEDERAL CREDIT UNION TO OBTAIN INFORMATION AND/ OR DOCUMENTATION TO VERIFY YOUR IDENTITY.

Signature of Primary Applicant

Date

Signature of Joint Applicant

Date



STEP 2- CLOSE ACCOUNTS AT OTHER INSTITUTIONS

WHAT TO DO: IF YOU HAVE AN ACCOUNT STILL OPEN AT ANOTHER BANK OR CREDIT UNION, FILL OUT THIS FORM TO TRANSFER LEFTOVER FUNDS TO YOUR WEBER STATE CREDIT UNION ACCOUNT.

ONCE YOU HAVE COMPLETED THE FORM, MAKE AN EXTRA COPY FOR YOUR RECORDS, SEPARATE AT THE DOTTED LINE, AND MAIL THE ORIGINAL FORM TO YOUR CURRENT FINANCIAL INSTITUTION. YOU MAY NEED TO MAKE MULTIPLE COPIES OF THIS FORM IF YOU ARE CLOSING ACCOUNTS AT MORE THAN ONE INSTITUTION.

TO: (NAME OF FINANCIAL INSTITUTION) _____

ADDRESS _____

TO WHOM IT MAY CONCERN,

I AM WRITING TO REQUEST THAT MY ACCOUNTS AT YOUR INSTITUTION BE CLOSED. PLEASE TRANSFER ANY REMAINING FUNDS TO:

WEBER STATE CREDIT UNION
4140 HARRISON BLVD
OGDEN, UT 84408

WEBER STATE CREDIT UNION ROUTING NUMBER: 324377710

WSCU ACCOUNT NUMBER _____

SINCERELY,

X _____

FROM:

	<i>Savings Account Number</i> _____
<i>Name of Primary owner</i>	<i>Checking Account Number</i> _____
<i>Name of Joint owner (if applicable)</i>	<i>Money Market Account Number</i> _____
	<i>Other Accounts</i> _____

Signature of Primary owner

Date

Signature of Joint Owner (if applicable)

Date



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STEP 2- CHANGE DIRECT DEPOSIT AND AUTOMATIC WITHDRAWALS

WHAT TO DO: IF YOU HAVE DIRECT DEPOSIT (AUTOMATIC DEPOSIT) FROM YOUR EMPLOYER, FILL OUT THIS FORM, SEPARATE AT THE DOTTED LINE, AND SUBMIT ONE COPY TO YOUR HUMAN RESOURCES OR PAYROLL PROCESSING DEPARTMENT, AND ANOTHER COPY TO WEBER STATE CREDIT UNION.

DIRECT DEPOSIT AUTHORIZATION AND CHANGE REQUEST

FROM: _____ (MEMBER NAME)

TO: _____ (EMPLOYER)

RE: DIRECT DEPOSIT CHANGE AUTHORIZATION

I HEREBY REQUEST AND AUTHORIZE TO HAVE MY NET PAY DEPOSITED EACH PAY PERIOD TO MY WEBER STATE CREDIT UNION ACCOUNT.

WEBER STATE CREDIT UNION ROUTING NUMBER: 324377710

WSCU ACCOUNT NUMBER _____

PLEASE DEPOSIT TO MY (SELECT ONE)

CHECKING ACCOUNT _____

SAVINGS ACCOUNT _____

DATE EFFECTIVE _____

Signature of Member

Date



**WEBER STATE
CREDIT UNION**
Rewarding Membership

4140 HARRISON BLVD.
OGDEN, UT 84408
801-399-9728

