



Credit Union Switch Kit

Follow these easy steps to transfer your accounts to Forrit Credit Union.

1. Open Your New Checking Account

Call a Member Relationship Specialist today at 503-275-0300 or 800-452-0915, option 2. They'll get the process started for you! – OR – establish your account online at www.forritcu.org. A Member Relationship Specialist will then follow up with you to help you through the process.

2. Ask Your Employer to Reroute Your Direct Deposit

When you open your new checking account, we will give you your account number and our routing number to make it easy for your employer to start your Direct Deposit. Enclosed is a "Direct Deposit Authorization" for you to provide your employer. If they require a check to get your direct deposit started, we can help you with that as well.

3. Sign up for our Lifestyle Line of Credit

Having a Lifestyle line of credit will offer you peace of mind while you're transitioning your account. It serves as overdraft protection – so if there is a delay in your direct deposit, you can rest easy that any bills you choose to pay will be covered. Talk to your Member Relationship Specialist directly at 503-275-0300 or 800-452-0915, option 2.

4. Get Connected

If you haven't already done so, sign up for our Online Banking and download our mobile app for your smartphone by searching for "Forrit credit union" in the app store. This will help you keep track of your account as you are transitioning and moving payments.

5. Set-up Bill Pay for Your New Account

If you like to pay bills online, set up your payments in our free Online Bill Pay. Use the enclosed "Bill Pay Worksheet" to make this process even easier.

6. Contact Companies that Direct-Debit Your Account

Make note of what businesses you may have authorized to directly debit your account. Contact them and let them know your new account information or enter their information into Bill Pay. An "Automatic Payment Change Form" to assist in this process has been included in this kit.

7. What you can expect:

Within 7 – 10 days of opening your account, your new debit card will arrive too! You can order checks (if you need them) and also apply for a credit card too – all at www.forritcu.org or over the phone with your Member Relationship Specialist. A Member Relationship Specialist will be keeping in close contact with you to ensure the transition to your new checking account is smooth.

8. Close Your Old Account

Once you have started receiving direct deposits into your new account and are sure that there are no outstanding checks or automatic debits that need to clear, close your old account.

Enjoy your new Forrit Credit Union Relationship and share the news with friends and family members – they may want to join the Forrit CU family too.



Direct Deposit Authorization

Please complete and return to your HR or payroll representative.

PERSONAL INFORMATION

Name: _____

Address: _____

Line 2: _____

City: _____ State: _____ Zip: _____

Phone Number: _____

Employee Number or Social Security Number: _____

ACCOUNT AND DEPOSIT INFORMATION

Forrit Credit Union Routing Number: **323075806**

Account Type: Checking Savings

Account Number: _____

Amount: Entire Pay

% of Pay _____%

Specific Dollar Amount: \$ _____

AUTHORIZATION

I hereby authorize my employer to initiate credits/deposits to the above account at Forrit Credit Union on a recurring basis until I notify in writing that I wish to cancel this authorization.

SIGNATURE _____ DATE _____



Bill Pay Worksheet

Use this worksheet to streamline the process of switching your current online bill payments to your new Forrit Credit Union Bill Pay.

Payee: _____ Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Account Number: _____

Account Description: _____ Due Date: _____

Payee: _____ Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Account Number: _____

Account Description: _____ Due Date: _____

Payee: _____ Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Account Number: _____

Account Description: _____ Due Date: _____

Payee: _____ Address: _____

City: _____ State: _____ Zip: _____

Phone Number: _____ Account Number: _____

Account Description: _____ Due Date: _____

***This worksheet is for personal use only and serves as a helpful tool in switching bill pay systems.*



Automatic Payment Change Form

Please update payment instructions per the information below:

Company or Payee: _____

Account Number: _____

Company Address: _____

City: _____ State: _____ Zip: _____

Payment Amount: _____ Frequency: Monthly Bi-weekly Weekly

Effective Date: _____

Please change payment to debit from: Forrit Credit Union
95 SW Taylor St.
Portland, OR 97204

Account Info:

Forrit Credit Union Routing Number: **323075806**

Account Type: Checking Savings

Account Number: _____

I authorize the above Company/Payee to update my automatic payments per these instructions:

SIGNATURE _____ DATE _____