

The Summit FCU Simple SwitchKit



Making the Switch from your current financial institution to The Summit is a breeze. Our step-by-step, easy to follow Simple SwitchKit will walk you through the process and help you make a smooth transition to more *convenient* and *rewarding* checking!

Step 1 > Open Your New Checking Account

Select one of 3 great checking options (Premium, Enhanced and Basic) that best fits your lifestyle, then stop by a branch to open your account today. You'll gain access to all the perks of Summit checking; including numerous FREE services, an extensive surcharge-free ATM network, access to thousands of Credit Union Service Center locations, and much more.

Step 2 > Make The Switch!

We've provided a *SwitchKit Direct Deposit Form* and a *SwitchKit Automatic Payment Form* to make the switch easier. These forms can be used to change your Direct Deposit with your employer and move any Automatic Withdrawals to your new account. Don't forget to change any payments that may use your old Debit Card. Use the **checklist** (see box on the right) to keep track of people you may need to contact. Please complete one form for each deposit or payment you wish to switch.

Step 3 > Close Your Old Accounts

Be sure to leave sufficient funds in your old account long enough for outstanding checks and automatic withdrawals to clear. Once all outstanding transactions have posted, then you can close the old account. Complete and send the *Account Closure Form* to your previous financial institution to request that they send you a check for the balance of the account.

Step 4 > Enjoy Your New Summit Checking

Take advantage of all the benefits of your new Summit Checking Account. Log onto Summit Online Access and Online Bill Payment at www.summitfcu.org and complete virtually any account transaction, from anywhere, at anytime with just the click of a mouse. Or use Quik Tran, our 24-hour Teller-by-Phone Service to gain access to your account whether you're at home, in the office, or on the road right over the phone. And best of all - Summit Online Access, Online Bill Payment and Quik Tran are **FREE!**

If you have any questions, don't hesitate to contact us.

By Phone: (585) 453-7030 or (800) 836-SFCU extension 7030

In Person: Stop by any one of our convenient branch locations

Online: www.summitfcu.org

Examples of Direct Deposits

- Payroll
- Social Security Administration
- Government
- Retirement
- Investments
- Child Support or court issued payments

Examples of Automatic Payments or Debits

Utility:

- Water
- Gas & Electric
- Cable / Internet / Satellite
- Telephone
- Cellular Phone
- Trash

Other Payments:

- Mortgage
- Loans (auto, home equity, credit card)
- Insurance (life, auto, homeowners, renters)
- Health Club
- Investments and Annuities
- Charitable Donations
- Child Support or court issued payments

The Summit FCU SwitchKit

Direct Deposit Form

Please complete and send this form to any company or organization that is automatically depositing funds into your existing Checking account.

Employee/ Depositor's Name _____

Address _____

City _____

State _____

Zip Code _____

To Whom It May Concern:

You are currently depositing (check one) my entire check part of my check

into the following account:

Financial Institution: _____

Address: _____

Routing Number: _____ Account Number: _____

Please stop depositing into the account listed above and begin depositing into my Summit account listed below. If this form is not sufficient to change my direct deposit, please forward your authorized company form for my signature. If you have any questions about this request, please contact me at my daytime phone number _____

The Summit Federal Credit Union
Canal Ponds Business Park
100 Marina Drive
Rochester, New York 14626
Routing and Transit # 222382315

Summit Account Number _____

(Check one) Checking Savings

I am paid: ___ weekly ___ bi-weekly ___ semi-monthly ___ monthly

X _____
Authorized Member's Signature _____ Date _____

Print Name _____

Address _____ City _____ State _____ Zip Code _____

_____ - _____ - _____
Social Security Number _____ Employer _____

**Please note that it may take several weeks for your direct deposit to be established. Also, the company establishing direct deposit may require additional information.*

If you have any questions, please contact The Summit Federal Credit Union at (585) 453-7030 or (800) 836-7328 extension 7030.
Mailing address: Canal Ponds Business Park, 100 Marina Drive, Rochester, New York 14626.



The Summit FCU SwitchKit

Automatic Payment Form

Please complete and send this form to any company or organization that is automatically withdrawing funds from your existing Checking account. Complete one form for each automatic payment. For examples of automatic payments, please see cover page.

Company to receive payment or current Financial Institution

Address

City

State

Zip Code

To Whom It May Concern:

I would like to change my payment instructions. Currently you are withdrawing a \$ _____ payment from:

Financial Institution: _____

Address: _____

Routing Number: _____ Account Number: _____

Account Type: _____

For (reason) _____ on (date) _____

Please stop making withdrawals from that account and begin withdrawing from my new Summit account listed below. If this form is not sufficient to change my withdrawal, please forward your authorized company form for my signature. If you have any questions about this request, please contact me at my daytime phone number _____

The Summit Federal Credit Union
Canal Ponds Business Park
100 Marina Drive
Rochester, New York 14626
Routing and Transit # 222382315

Summit Account Number _____

(Check one) Checking Savings

X _____

Authorized Member's Signature

Date

Print Name

Address

City

State

Zip Code

**Please note: If you make a payment from your checking account, it is advised that you attach a voided check or deposit slip from your new Summit account. It is also recommended that you maintain accounts at both financial institutions until your automatic withdrawal authorization change is complete. The company that generates your automatic withdrawal may require additional forms in order to process your request.*

If you have any questions, please contact The Summit Federal Credit Union at (585) 453-7030 or (800) 836-7328 extension 7030. Mailing address: Canal Ponds Business Park, 100 Marina Drive, Rochester, New York 14626.



The Summit FCU SwitchKit Account Closure Form

Please complete and send this form to your current financial institution to close your account(s). Please remember to keep enough funds in the account until all outstanding payments and transactions have cleared.

Financial Institution's Name _____

Address _____ City _____ State _____ Zip Code _____

To Whom It May Concern:

Please close my account _____ (account number), and send a check for the remaining balance to me at the address listed below for any remaining funds and interest earned in the account(s).

Please close the following accounts:

Account # _____ Account Owner's Name(s) _____

(Check one) Savings Checking Money Market Other _____

Account # _____ Account Owner's Name(s) _____

Savings Checking Money Market Other _____

Account # _____ Account Owner's Name(s) _____

Savings Checking Money Market Other _____

Please send a check for the remaining balance to:

The Summit Federal Credit Union, Canal Ponds Business Park, 100 Marina Drive
Rochester, NY 14626, Attention: Member Service Center

Mail the check to me at the address below.

If you have any questions about this request, please contact me at my daytime phone number

_____.

Thank you for your assistance.

X _____

Authorized Member's Signature

_____ Date

_____ Print Name

Address _____ City _____ State _____ Zip Code _____

Please remember to keep enough funds on deposit for checks, automatic withdrawals or ATM/ VISA Check Card transactions that may be pending. Once all outstanding transactions have posted, mail this form to your financial institution for processing.



The Summit FCU SwitchKit Online Bill Payment Worksheet

The Summit FCU offers FREE Online Bill Payment to all members. Online Bill Payment allows you not only the ability to pay all of your bills from one simple-to-use site, but also provides you with the convenience of receiving, viewing and managing your bills at the same online location. Online Bill Payment is easy and secure 24 hours a day, 7 days a week.

Use the worksheet below to track your bills paid through Online Bill Payment/Payment Manager system with your current financial institution. Once you establish Summit membership, you can begin to set-up your payees and payments in Online Bill Payment.

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____

Payee Name _____ Account # _____

Address _____

City _____ State _____ Zip Code _____