

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 One > 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 Two > 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** to 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 Three > 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 Four > Enjoy Your New Summit Checking

Take advantage of all the benefits of your new Summit Checking Account. Log onto Summit Online Access 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 - both Summit Online Access 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

Examples of Automatic Payments or Debits

- Mortgage
- Auto Loans
- Insurance> Auto
- Insurance> Medical
- Insurance> Homeowners
- Insurance> Life
- Water
- Gas & Electric
- Cable
- Telephone
- Cellular Phone
- Credit Cards
- Online Services
- Health Club
- Investments & Annuities
- Charitable Donations

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]

[Complete Address, including City, State and Zipcode]

To Whom It May Concern:

You are currently depositing my **ENTIRE PAYCHECK/ PART OF MY PAYCHECK** (please circle one) into the following account:

[Current Financial Institution]

[Routing and Transit 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

[Financial Institution]

Account Number _____

[To be completed by a Summit FCU representative]

Routing and Transit Number 222382315 **Code For** Checking Savings

X _____

[Authorized Member's Signature]

[Date]

[Print Name]

[Complete Address, including City, State and Zipcode]

[Social Security Number]

[Employer]

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

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.

[Company to receive payment or current Financial Institution]

[Complete Address, including City, State and Zipcode]

To Whom It May Concern:

You are currently withdrawing \$ _____ for the payment of
[Dollar amount]

_____ on _____ from the account listed below:
[Auto, Credit Card, Mortgage] [Date of withdrawal]

[Current Financial Institution]

[Routing and Transit Number]

[Account Number]

Please stop drafting from the account listed above and begin drafting from my Summit account listed below. If this form is not sufficient to change my automatic payment, 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

[Financial Institution]

Account Number _____

[To be completed by a Summit FCU representative]

Routing and Transit Number 222382315 **Code For** Checking Savings

I hereby authorize my automatic payments to change as indicated above.

X _____
[Authorized Member's Signature] [Date]

[Print Name]

[Complete Address, including City, State and Zipcode]

Please maintain a balance in your account(s) to cover any outstanding debits and credits. The Summit Federal Credit Union is not responsible for overdraft charges incurred from insufficient funds.

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.

[Financial Institution's Name]

[Complete Address, including City, State and Zipcode]

To Whom It May Concern:

Please close my account _____ and:

[Account Number]

(please check one)

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, or

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]

[Complete Address, including City, State and Zipcode]

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.

