



Canal Ponds Business Park  
100 Marina Drive • Rochester, New York 14626  
(585) 453-7000 • (800) 836-7328  
summitfcu.org

### Intent to Close Account Request

**Account Number:** \_\_\_\_\_

**Preferred Branch:** drop down include I don't use a branch – use virtual branch and add virtual as option

**Primary Member:** \_\_\_\_\_ **Social Security #:** \_\_\_\_\_

**Joint Member:** \_\_\_\_\_ **Social Security #:** \_\_\_\_\_

**Reason for closing account:**

- |  |  |
|--|--|
| <input type="checkbox"/> I moved out of area                                 | <input type="checkbox"/> The branch/ATM locations are not convenient |
| <input type="checkbox"/> I no longer use this account                        | <input type="checkbox"/> I paid off my loan                          |
| <input type="checkbox"/> I am consolidating accounts but I am still a member | <input type="checkbox"/> Fees  |

☐ I found more convenient services elsewhere - Please explain: \_\_\_\_\_

☐ Other - Please explain: \_\_\_\_\_

By signing below, I request The Summit FCU contact me in regards to the closure of the account indicated above. I do this with the understanding that if I close my membership, I may not be eligible for membership in the future. I also understand that to close my credit union membership, I must pay off any loan balances at The Summit. In addition, I agree to cancel all recurring transactions and ensure all transactions have cleared my accounts prior to requesting this account closure. In the unlikely event a pending transaction (Debit Card, ACH, etc) clears my account after closure, I accept responsibility for it.