

# STEP 1 Switch Kit Worksheet

We'll make it quick and easy to switch your accounts to First Education Federal Credit Union. Simply use this handy checklist to help you make the switch!

1. Have your First Education Federal Credit Union account number(s) ready when completing the authorization forms in the switch kit:

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

First Education's Routing Number: **307086617**

2. Gather information to switch direct deposits/automatic deposits using the **Authorization To Change Direct Deposit:**

- |   |  |
|---|--|
| <input type="checkbox"/> Employer deposit               | <input type="checkbox"/> Brokerage deposits                      |
| <input type="checkbox"/> Government deposit             | <input type="checkbox"/> Child support or court-ordered deposits |
| <input type="checkbox"/> Social Security Administration | <input type="checkbox"/> Other                                   |

3. Gather information to switch automatic payments/withdrawals using the **Authorization To Change Automatic Withdrawal:**

- |  |   |
|--|---|
| <input type="checkbox"/> Mortgage/Rent                   | <input type="checkbox"/> Auto                 |
| <input type="checkbox"/> Association Fees                | <input type="checkbox"/> Club/Membership Dues |
| <input type="checkbox"/> Internet service                | <input type="checkbox"/> Cable TV/Satellite   |
| <input type="checkbox"/> Investments                     | <input type="checkbox"/> Credit Cards         |
| <input type="checkbox"/> Utilities: Electric, Gas, Water | <input type="checkbox"/> Phone/Cell Phone     |
| <input type="checkbox"/> Online billing                  | <input type="checkbox"/> Insurance            |
| <input type="checkbox"/> Other                           | <input type="checkbox"/> Other                |

4. Close any unnecessary savings, checking & bill payment accounts using the **Authorization To Close Account:**

Other Financial Institutions (Name and Address):

\_\_\_\_\_

5. Transfer high-rate credit card balances to your First Education Federal Credit Union VISA® using the **Balance Transfer Authorization:**

Credit Cards to Transfer (card number):

\_\_\_\_\_

6. Additional money-saving options to explore:

- Refinance your auto loan at First Education Federal Credit Union.
- Refinance your mortgage loan at First Education Federal Credit Union.
- Tap your home's equity with one of First Education Federal Credit Union home equity services.

**For additional details** — or help switching your accounts to First Education Federal Credit Union — just ask us! We'll be glad to help. Please visit our branch office or call **307.432.7400** or **800.584.9366**.



## STEP 2 Authorization to Change Direct Deposit

**Instructions:** Complete this authorization to change direct deposits to First Education Federal Credit Union. Provide this completed form to your payroll office or any other payor who makes automatic deposits to your account.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employer/Depositor's Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

To Whom It May Concern:

You are currently making direct deposits on my behalf to this account:

\_\_\_\_\_  
Old Bank

\_\_\_\_\_  
Routing Number

\_\_\_\_\_  
Account Number

Please discontinue direct deposits at the financial institution listed above and immediately start direct deposits to my account at:

**First Education Federal Credit Union**

PO Box 20030

Cheyenne, WY 82003

**Routing Number: 307086617**

Account Number: \_\_\_\_\_ Savings  Checking  (check one)

If you have any questions about this request, please contact me.

\_\_\_\_\_ (phone number). Day  Evening  (check one)

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

\_\_\_\_\_  
Employee ID Number



## STEP 3 Authorization to Change Automatic Withdrawal

**Instructions:** Complete this authorization to have automatic withdrawals made from your First Education Federal Credit Union account. Print one authorization for each company that makes automatic withdrawals from your account. Remember to change any automatic payments made by debit card.

Current Date: \_\_\_\_\_

Name of Company \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

To Whom It May Concern:

You are currently withdrawing (amount) \$ \_\_\_\_\_ (frequency) \_\_\_\_\_ for (purpose) \_\_\_\_\_  
from the following institution or credit card:

Old Bank \_\_\_\_\_

OR

Routing Number \_\_\_\_\_

Card Number \_\_\_\_\_

Account Number \_\_\_\_\_

**Please discontinue withdrawals from the account listed above and (check one):**

Begin withdrawals from my account at:

**First Education Federal Credit Union**  
PO Box 20030  
Cheyenne, WY 82003

**Routing Number:** 307086617      **Account Number:** \_\_\_\_\_

Savings  Checking (check one)

Begin withdrawals from my First Education Federal Credit Union VISA®  debit card /  credit card::

Card Number: \_\_\_\_\_ Expiration: \_\_\_\_\_ CVV: \_\_\_\_\_

I will use First Education Federal Credit Union's Bill Pay service to make future payments.

If you have any questions about this request, please contact me at this phone number \_\_\_\_\_.

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip



# STEP 4 Authorization to Close Account

**Instructions:** Complete this authorization to close accounts at other financial institutions and have funds transferred to your First Education Federal Credit Union account. Print one authorization for each financial institution where you have accounts. Remember to destroy old checks and your old ATM and debit cards.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Bank/Other Financial Institution Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

To Whom It May Concern:

Please close my account(s) with your financial institution:

Account Numbers: \_\_\_\_\_

Account Holders: \_\_\_\_\_

ID Verification (SSN or secret account code): \_\_\_\_\_

And send a check for the remaining balance(s) to my new account at:

**First Education Federal Credit Union**  
PO Box 20030  
Cheyenne, WY 82003

**Routing Number:** 307086617

Account Number: \_\_\_\_\_ Savings  /Checking  (check one)

I have also made arrangements to discontinue any direct deposit and automatic withdrawal of funds from my account(s) with your financial institution.

If you have any questions about this request, please contact me.

\_\_\_\_\_ (phone number). Day  /Evening  (check one)

Thank you.

Sincerely,

\_\_\_\_\_  
Account Holder 1 Signature

\_\_\_\_\_  
Account Holder 2 Signature

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip



# STEP 5 Authorization to Transfer Credit Card Balances

Transfer your high rate balances to your  
First Education VISA Credit Card

Rates as low as **9.25%** APR  
Fixed Rate • No Annual Fee  
• No Balance Transfer Fee

**Instructions:** Complete this authorization to have credit accounts with other creditors switched to your First Education Federal Credit Union VISA. Use more forms as needed. Return this form to First Education.

## BALANCE TRANSFER #1 INFORMATION

\_\_\_\_\_  
Name of Creditor

\_\_\_\_\_  
Payment Address

\_\_\_\_\_  
City, State, ZIP+4

\_\_\_\_\_  
Account Number

Amount to Transfer \$ \_\_\_\_\_

## BALANCE TRANSFER #2 INFORMATION

\_\_\_\_\_  
Name of Creditor

\_\_\_\_\_  
Payment Address

\_\_\_\_\_  
City, State, ZIP+4

\_\_\_\_\_  
Account Number

Amount to Transfer \$ \_\_\_\_\_

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/ State/ Zip Code

\_\_\_\_\_  
First Education Account Number

\_\_\_\_\_  
Daytime Phone Number

Please attach the most recent statement for each credit card to be transferred. Balance transfers will be treated as cash advances and do not carry a grace period.. Please continue to make payments on your other credit accounts until the Credit Union notifies you that the balance(s) have been transferred. Payment of the amount(s) authorized by you may or may not satisfy any outstanding balance(s) on the designated account(s). The Credit Union is not responsible for any remaining balance(s) or additional charges resulting in any delay in the payment and transfer of balance(s). The total amount(s) paid and transferred cannot exceed your account credit line. The Credit Union reserves the right to refuse any balance transfer request. Please see our Visa disclosure or call us for details.

**X**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

