



OCCU CHECKING SWITCH KIT:

Switch to an account that gives you more.

We're glad you're choosing Oregon Community Credit Union. To get started with your new account, follow these five simple steps to complete your switch. As you make your way through this switch kit, you'll find tips to help you organize and a few simple forms, which should be sent to third parties such as your employer and old bank. By following these five steps, you'll be ready to say goodbye to your old bank and hello to OCCU member benefits.

GET STARTED:

- 1** Review your OCCU account information

- 2** Organize your transactions to switch

- 3** Move automatic payments and direct deposits to your new account

- 4** Close your old account

- 5** Deposit any remaining funds from your old account and get to know OCCU



Step 1—Today

Review your OCCU account information

Welcome! To get started, make sure you have your 10-digit OCCU account number as well as your personal information on hand, so you can complete this OCCU Switch Kit.

Haven't opened your account yet? We'll help you get started. You can open your account by calling us at 800.365.1111, visiting one of our branches or opening online at MyOCCU.org.

FIND A BRANCH NEAR YOU

We're always here for you — [online](#), over the phone and face-to-face. Feel free to give us a call at 800.365.1111 or stop by a branch near you.

BARGER BRANCH

📍 4239 Barger Drive
Eugene, OR 97402

🕒 Mon - Fri: 10 am - 6 pm

DOWNTOWN BRANCH

📍 488 E. 11th Avenue
Eugene, OR 97401

🕒 Mon - Fri: 10 am - 6 pm

SOUTH EUGENE BRANCH

📍 2890 Willamette Street
Eugene, OR 97405

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

CAMPUS SERVICE CENTER

(INSIDE THE DUCK STORE)

📍 895 East 13th Avenue
Eugene, OR 97401

🕒 Mon - Fri: 7:45 am - 6:00 pm
Sat: 10 am - 2 pm

MOHAWK BRANCH

📍 1981 Mohawk Blvd.
Springfield, OR 97477

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

WEST 11TH BRANCH

📍 3065 West 11th Avenue
Eugene, OR 97402

🕒 Mon - Fri: 10 am - 6 pm

COBURG ROAD BRANCH

📍 2525 Coburg Road
Eugene, OR 97408

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

SANTA CLARA BRANCH

📍 45 L Division Avenue
Eugene, OR 97404

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

SALEM SERVICE CENTER

📍 2755 Commercial Street SE,
Ste. 104
Salem, OR 97302

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

WILSONVILLE BRANCH

📍 29990 SW Town Center Loop West, Suite C
Wilsonville, OR 97070

🕒 Mon - Fri: 10 am - 6 pm
Sat: 10 am - 2 pm

Step 2—In the next week

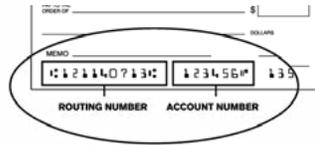
Organize your transactions to switch



Fill out the following sections to list transactions like automatic bill pay or deposits that you'll be switching to your new OCCU account. By listing all of your automatic payments or deductions in one place, you can be sure that you're ready to switch without missing a payment.

SECTION 1

List your old bank account number and routing information here for reference. You can find this information on your checks, monthly statements or the bank's website. If you're having trouble locating this information, you can also give them a call.



FINANCIAL INSTITUTION

ROUTING NUMBER

ACCOUNT NUMBER

SECTION 2

Use a recent statement from your existing account to list the following.

As you fill out this section, remember to include recurring debit transactions as well as online bill payments such as gym memberships, media streaming services, utility bills, magazine or newspaper subscriptions and any online shopping accounts.

DEPOSITS List businesses that make **direct or automatic deposits** to your accounts here:

| COMPANY | ACCOUNT NUMBER | DEPOSIT AMOUNT |
|---------|----------------|----------------|
| | | |
| | | |
| | | |

DEDUCTIONS List any bills or businesses that take **payments** automatically from your account here:

| COMPANY | ACCOUNT NUMBER | WITHDRAWAL AMOUNT |
|---------|----------------|-------------------|
| | | |
| | | |
| | | |

SECTION 3

Take a few notes. Keep track of any other recent transactions that occurred in your checking account, such as any outstanding checks.

| ACCOUNT | AMOUNT | DATE |
|---------|--------|------|
| | | |
| | | |
| | | |

Step 3—In the next two weeks

Move direct deposits and automatic payments to your new account



From paychecks to monthly bills, you want to make sure all of your important payments and deposits are in sync with your new account. We're here to help. Use one of the three forms included on pages 5-7 to notify your old bank, employer or other business that you're switching your transactions to your new account with OCCU.

Still have questions? Give us a call at 800.365.1111

Direct deposit to OCCU

Let your employer(s) know that you've switched to an OCCU account by following these simple steps:

1. Fill out this form completely, sign and date it.
2. Give the form to your employer. If you have multiple employers, give separate copies of the form to each.*

**NOTE: Some employers may require you to use their own forms or online systems. If so, simply use this form for reference.*

Automatic deposits to OCCU

Redirect any automatic deposits you may have to your new OCCU account by following these simple steps:

1. Fill out this form completely, sign and date it.
2. Give this form to any third party you receive automatic deposits from, such as Social Security.*

**NOTE: Some third parties may require you to redirect deposits over the phone or through their website. If so, simply use this form for reference.*

Automatic deductions from OCCU

Redirect loan payments and other monthly deductions to your new OCCU account. Simply do the following:

1. Fill out this form completely, sign and date it.
2. Give the form and a voided check to every business authorized to make automatic deductions from your account. If you don't have a check yet, simply provide the OCCU routing number and your 10-digit account number.*

**NOTE: Some businesses may require you to redirect deductions over the phone or through their website. If so, simply use this form for reference.*

Switch my direct deposit to OCCU



EMPLOYEE NAME

EMPLOYEE ID (IF APPLICABLE)

EMPLOYEE PHONE

I WANT TO DEPOSIT THE FOLLOWING TO MY OCCU ACCOUNT:

100% OF NET PAY

_____ % OF NET PAY

\$ _____ OF NET PAY

OCCU 10-DIGIT ACCOUNT NUMBER

OCCU ROUTING NUMBER 323274461

CHECKING

MONEY MARKET

SAVINGS

ADDRESS

Oregon Community Credit Union P.O. Box 77002

CITY, STATE, ZIP

Springfield, OR 97475-0146

I authorize

EMPLOYER

to make any necessary corrections to erroneous deposits in my OCCU checking account.

SIGNATURE

X

DATE

I understand that this authorization will remain intact until the company named above has received written notification from me of its termination in such time as to afford the company and credit union a reasonable opportunity to act.

***NOTE: Some employers may require you to use their own forms or online systems. If so, simply use this form for reference.**

Switch my automatic deposits to OCCU



ATTENTION OF:

COMPANY NAME

COMPANY ADDRESS

CITY, STATE, ZIP

TO WHOM IT MAY CONCERN:

I've recently opened a new checking account with OCCU and wish to move my automatic deposits to this new account.

MY AUTOMATIC DEPOSITS CURRENTLY GO TO:

NAME ON BANK ACCOUNT

NAME OF BANK

ACCOUNT NUMBER

ROUTING NUMBER

PLEASE SWITCH MY AUTOMATIC DEPOSITS TO:



CHECKING



SAVINGS

OCCU 10-DIGIT ACCOUNT NUMBER

ROUTING NUMBER **323274461**

DEPOSIT AMOUNT

DEPOSIT FREQUENCY

ADDITIONAL NOTES

STARTING

IF YOU WISH TO CONFIRM THIS, YOU CAN REACH ME AT

SIGNATURE **X**

DATE

***NOTE: Some third parties may require you to redirect deposits over the phone or through their website. If so, simply use this form for reference.**

Switch my automatic deductions to OCCU



ATTENTION OF:

COMPANY NAME

COMPANY ADDRESS

CITY, STATE, ZIP

TO WHOM IT MAY CONCERN:

I've recently opened a new account with OCCU and wish to move my automatic deductions to withdraw from my new OCCU account.

MY NAME

ACCOUNT NUMBER

WITHDRAWAL AMOUNT

WITHDRAWAL FREQUENCY

ADDITIONAL NOTES

MY AUTOMATIC DEDUCTIONS ARE CURRENTLY TAKEN FROM (MY OLD ACCOUNT):

NAME ON BANK ACCOUNT

NAME OF BANK

ACCOUNT NUMBER

ROUTING NUMBER

PLEASE SWITCH MY AUTOMATIC DEDUCTIONS TO:



CHECKING



SAVINGS

OCCU 10-DIGIT ACCOUNT NUMBER

ROUTING NUMBER

323274461

STARTING

IF YOU WISH TO CONFIRM THIS, YOU CAN REACH ME AT

SIGNATURE **X**

DATE

***NOTE: Some businesses may require you to redirect deductions over the phone or through their website. If so, simply use this form for reference.**

Step 4—In the next 45 days

Close your old bank account



Now that you have an account with OCCU, it's time to close your old bank account and enjoy your new member benefits. Remember, if you have any questions about closing your old account, we're happy to help. You can reach us at 800.365.1111. To close your old account, just do the following:

1. Make sure your OCCU account is updated with all of your automatic payments and direct deposits.
2. Make sure all transactions from your old account have cleared.
3. Complete the form below, sign it, date it and mail or take it to your bank. Your bank will mail you a cashier's check with the remainder of your balance.
 - If you'd rather complete this step over the phone, simply call your old bank to close your account.

TO WHOM IT MAY CONCERN:

Please close my account at BANK NAME: _____
 effective DATE: _____

NAME ON ACCOUNT ACCOUNT NUMBER

CHECKING MONEY MARKET SAVINGS

Please send me a cashier's check for the balance remaining in this account.

BALANCE REMAINING: \$ PAYABLE TO _____
ADDRESS _____
CITY, STATE, ZIP _____
IF YOU HAVE QUESTIONS, PLEASE CONTACT ME AT _____

IF APPLICABLE:

SECOND NAME FOR JOINT ACCOUNT ACCOUNT NUMBER

CHECKING MONEY MARKET SAVINGS

Please send me a cashier's check for the balance remaining in this account.

BALANCE REMAINING: \$ PAYABLE TO _____
ADDRESS _____
CITY, STATE, ZIP _____
IF YOU HAVE QUESTIONS, PLEASE CONTACT ME AT _____

SIGNATURE **X** DATE _____

JOINT SIGNATURE **X** DATE _____

Step 5—After you switch accounts

Deposit your check and get to know OCCU

Even though you've already made a deposit to open your new OCCU account, you'll also need to deposit remaining funds from your old account to finalize the switch. Once you've received your cashier's check for the remaining balance from your old bank account, deposit it into your new OCCU account by using the mobile deposit feature on the free MyOCCU mobile app or by stopping by any branch location.

IT'S GREAT TO BE A MEMBER

By opening an OCCU account, you've become a valuable OCCU member. That means you're entitled to great service and helpful benefits, like:

- ✓ Becoming both a member and an owner as soon as you deposit \$5 into your Primary Savings account.
- ✓ Access to Balance, a financial education center with online courses including topics like money management and investing basics.
- ✓ Convenient banking online, with our free mobile app, in person or through our call center.
- ✓ Basic level accidental death and dismemberment insurance.
- ✓ Ability to conduct transactions at thousands of credit unions nationwide through the Shared Branch Network.
- ✓ A federal insurance program for qualified deposits through National Credit Union Administration (NCUA), which insures your deposits for up to \$250,000.
- ✓ Access to over 30,000 surcharge-free CO-OP Network ATMs nationwide.
- ✓ Complimentary identity theft protection through Identity Fraud Inc.
- ✓ Free financial resources to help you through processes like first-time home buying, paying for college and protecting yourself from financial crimes.
- ✓ We believe in providing more than you expect, and everything you deserve.

Welcome! We're so glad you're a member.