



# Transfer U Kit

Ready to transfer your accounts to American Eagle Financial Credit Union? Our Transfer U Kit provides instructions, tools and tips to make switching as easy as 1, 2, 3!

## STEP 1

Open your new Membership (i.e., a Savings account with as little as \$5), and a Checking account at [americaneagle.org](http://americaneagle.org) or any of our branch locations.

- ▶ Walk out with your activated Visa® Debit Card. Opened your account online? You'll receive your debit card by mail in about a week or you can stop by any AEFCU branch office to have a card printed instantly.
- ▶ Set up Online Banking and Bill Pay to manage your finances online.
- ▶ Download our Mobile App from your App store for 24/7 access to your accounts.

[Mobile App \(Android\)](#)

[Mobile App \(Apple\)](#)

## STEP 2

Switch your automatic transactions

- ▶ Use our Direct Deposit Change Authorization form to automatically deposit funds from your paycheck, social security or other income sources electronically into your AEFCU Checking account;
- ▶ And our Automatic Payment Change Authorization form to notify companies who are automatically withdrawing funds from your existing checking account that you've changed financial institutions. Our Automatic Payment Checklist provides an easy-to-use checklist of common payees to assist you..

## STEP 3

Close your old account(s).

- ▶ Use our Authorization to Close form to notify your previous credit union or bank that you've switched and to close your account(s). Stop using those account(s) and start enjoying all the benefits that membership with American Eagle has to offer!
- ▶ Need assistance? A switch specialist is available to assist you at any branch location or by calling toll-free 800.842.0145.



# Automatic Payment Change Authorization

Complete this form and submit it to any company that is automatically withdrawing payments from your existing account (insurance, gym membership, mortgage, etc.). Check to see how long it will take them to make the switch. Times will vary.

## Information

Name \_\_\_\_\_

Address \_\_\_\_\_

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

Payment Description \_\_\_\_\_

## I currently have my payment automatically withdrawn from:

Name of Financial Institution \_\_\_\_\_

Withdraw these funds from my (check one):

Checking       Savings

Please transfer this scheduled transaction to:

American Eagle Financial Credit Union  
P.O. Box 280128  
East Hartford, CT 06128-0128  
800.842.0145

Routing Number: 211176891      Account Number: \_\_\_\_\_

I authorize you to redirect future automated payment withdrawals to American Eagle Financial Credit Union.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



# Direct Deposit Change Authorization

Complete this form and submit it to any company or organization that is automatically depositing funds into your existing checking account.

## Information

Name \_\_\_\_\_

2nd Name (if joint) \_\_\_\_\_

Address \_\_\_\_\_

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

Home/Cell Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

## Please discontinue sending my automatic deposit to:

Name of Financial Institution \_\_\_\_\_

Check one of the options below:

Deposit entire amount to the Checking account listed below.

Deposit \$ \_\_\_\_\_ to the Checking account listed below. Please begin sending this deposit to:

American Eagle Financial Credit Union  
P.O. Box 280128  
East Hartford, CT 06128-0128  
800.842.0145

Routing Number: 211176891      Account Number: \_\_\_\_\_

I authorize that the above-listed entity initiate the deposit of my funds to my American Eagle Financial Credit Union Checking account and that this authorization is to remain in effect until I send written notice of change or cancellation.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



# Authorization to Close

To close your checking account(s) at your current bank, please complete this form for each checking account, making copies of this form as necessary. Mail the completed form(s) to your current bank.

## Account to Close

Financial Institution Name \_\_\_\_\_

Your Name \_\_\_\_\_

2nd Name (if joint) \_\_\_\_\_

Address \_\_\_\_\_

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

## Please close the following accounts (check all that apply):

Checking Account # \_\_\_\_\_

Savings Account # \_\_\_\_\_

Other Account # \_\_\_\_\_

Please send a check payable to me/us for the remaining balance(s) in the above-described account(s) to the address on file.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



# Automatic Payment Checklist

Use this checklist to track the bills you would like to begin auto-paying from your new American Eagle account. Use our Switch My Automatic Payments form to easily establish new automatic payments or transfers.

Check if Payment Applies ✓	Type of Payment or Transfer (review a recent statement from your previous account to identify your payments or transfers)	Payee Name
	Example: Mobile Phone	Verizon Wireless
	Mortgage/Rent/Home Equity	
	Auto Loan/Lease	
	Insurance (auto, home, life)	
	Electric	
	Gas/Oil	
	Water	
	Telephone	
	Mobile Phone	
	Cable/Satellite TV	
	Internet Provider	
	Memberships/Subscriptions	
	Credit Cards	
	Department Store Cards	
	Loans (personal, student)	
	Savings/Investments/IRA	
	Daycare	

### Common payees

Mortgage/Rent/Home Equity  
Your landlord  
Your previous bank or credit union  
Private lender (Quicken Loans, Citi Mortgage)

#### Insurance

AAA  
Geico  
Liberty Mutual  
Nationwide  
Progressive  
State Farm

#### Electric

Eversource  
United Illuminating

#### Gas/Oil

Connecticut Natural Gas  
Eversource

#### Telephone

AT&T  
Comcast  
Vonage

#### Mobile Phone

AT&T  
Sprint  
T-Mobile  
Verizon  
Pay-as-you-go or prepaid providers

#### Cable/Satellite TV

Comcast  
Dish Network  
DirecTV  
Frontier

#### Internet Provider

AT&T  
Comcast  
Frontier  
XFINITY

#### Memberships/Subscriptions

Amazon Prime  
Costco/Bjs  
Magazine/Newspaper/ePublication  
Netflix/Hulu  
Other monthly club memberships

#### Credit Cards

American Express  
Chase  
Citi  
Discover  
MasterCard  
Visa  
Other retail store cards

