



“It’s Where You Belong”

The Easy SwitchKit

At Winthrop Federal Credit Union, we realize that moving your account can be complicated. That's why we stay with you every step of the way until you are completely settled. We will make switching banks easy for you.

Our Easy SwitchKit includes all the forms you will need to get started. You can fax, mail or bring them to the Winthrop Federal Credit Union (Winthrop South End branch). Then just stop in with your ID to officially open your new account. We will stay with you throughout your bank move, helping you through any additional paperwork requirements or questions as your new account is established with us.

Here are some things you will need to know:

- Our Name: Winthrop Federal Credit Union
- Our Address: 15 Woodside Avenue, Winthrop, MA 02152
- Our Routing Number: 211386924
- Our Telephone Number: 617-846-1226 (ext. 218/219/220 for Member Services)

If you have Direct Deposit of your Social Security payment:

- Call them at 1-800-772-1213 and they will take your information over the telephone, or
- We can place the call for you from our office. They will need to speak with you directly to make sure of your instructions.

Please note: It can take up to three weeks for the change to be made, so you should time your request for just after you receive your payment.

If you have Direct Deposit of your paycheck:

- Complete the Direct Deposit form in our Easy SwitchKit and send it to the Human Resource Department where you work.
- They may ask you to complete another form on their “official” company form but at least you will have all the information you will need.

If you have any automatic payments and/or automatic deposits to your account:

- Complete the forms in this Easy SwitchKit identifying any and all automatic debits/credits
- They may ask you to complete another form on their “official” form but at least you will have all the information you will need.



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Account Relationships: I have the following accounts at my present bank:

Checking Accounts

ACCOUNT NUMBER _____

ACCOUNT NAME, TYPE OR FEATURES _____

APPROXIMATE BALANCE \$ _____

Money Market Accounts

ACCOUNT NUMBER _____

ACCOUNT NAME, TYPE OR FEATURES _____

APPROXIMATE BALANCE \$ _____

Savings Accounts

ACCOUNT NUMBER _____

ACCOUNT NAME, TYPE OR FEATURES _____

APPROXIMATE BALANCE \$ _____

Certificates of Deposit

ACCOUNT NUMBER _____

ACCOUNT NAME, TYPE OR FEATURES _____

APPROXIMATE BALANCE \$ _____



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Request to Close Accounts at Previous Bank

To: _____
(NAME OF FINANCIAL INSTITUTION)

From: _____
(NAME OF ACCOUNT HOLDER)

(STREET ADDRESS, CITY STATE ZIP CODE)

Date: _____
(TODAY'S DATE)

Re: **Account closing and transfer of funds**

ACCOUNT NUMBER TYPE OF ACCOUNT ACCOUNT TITLE

ACCOUNT NUMBER TYPE OF ACCOUNT ACCOUNT TITLE

Effective immediately, please close the above account(s). The balance in my account(s)) should be aggregated and then wire transferred or mailed, in the form of a Bank check, to:

Name of Bank: Winthrop Federal Credit Union

Address: 15 Woodside Avenue

Routing Number: 211386924

Account Number: _____
(NEW ACCOUNT NUMBER)

For the Benefit Of: _____
(ACCOUNT NAME)

Thank you for your assistance in making this change.

Sincerely,

(CUSTOMER'S SIGNATURE)

(DAYTIME PHONE NUMBER)



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Direct Deposit Switch Form

To: _____
(NAME OF COMPANY)

From: _____
(YOUR NAME)

Date: _____
(TODAY'S DATE)

Re: Transfer of Direct Deposit

Effective immediately, please transfer my direct deposit to my new account at:

Name of Institution: Winthrop Federal Credit Union

Address: 15 Woodside Avenue, Winthrop, MA 02152

Routing Number: 211386924

Account Number: _____
(NEW ACCOUNT NUMBER)

Thank you for your assistance in making this change.

Sincerely,

(SIGNATURE)

(PRINT YOUR NAME HERE)

(PRINT YOUR ADDRESS HERE)

(DAYTIME TELEPHONE NUMBER)



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Account Automatic Debits and Credits Switch Form

I have the following direct deposits to the accounts at my present bank:

COMPANY SENDING THE DEPOSIT _____

ACCOUNT NUMBER _____

CONTACT NAME & PHONE _____

DATE OF CREDIT _____

I have the following automatic withdrawals from the accounts at my present bank:

COMPANY RECEIVING THE PAYMENT _____

ACCOUNT NUMBER _____

CONTACT NAME & PHONE _____

DATE OF DEBIT _____



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- Automatic Payment
 Automatic Deposit (other than employee direct deposit)

To: _____
(NAME OF COMPANY)

From: _____
(YOUR NAME)

Date: _____
(TODAY'S DATE)

Re: Transfer of Automatic Transaction

Effective immediately, please transfer my automatic transactions to my new account at:

Name of Institution: Winthrop Federal Credit Union

Address: 15 Woodside Avenue, Winthrop, MA 02152

Routing Number: 211386924

Account Number: _____
(NEW ACCOUNT NUMBER)

Thank you for your assistance in making this change.

Sincerely,

(SIGNATURE)

(PRINT YOUR NAME HERE)

(PRINT YOUR ADDRESS HERE)

(DAYTIME TELEPHONE NUMBER)