



**Clarion**  
814-226-5032

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814-715-7160

**Cranberry**  
814-670-0659

144 Holiday Inn Rd  
Clarion, Pa 16214

204 Allegheny Blvd  
Brookville, Pa 15825

6935 US 322  
Cranberry, Pa 16319

# Account Switch Guide

Thank you for choosing Clarion Federal Credit Union! The following information will help ease your account transition. Your account switch guide includes:

- Account closing process
- Transition checklist
- Change of direct deposit form
- Change of automatic payments form

## Closing your account at another financial institution

The easiest part of the transition process is closing your account at another financial institution. You simply need to visit your financial institution and request to close your account. Make sure you have completed the items listed below before closing your other account:

- All pending transactions have cleared old account
- Switch direct deposit to new Credit Union account
- Switch all automatic payments to new Credit Union account
- Contact financial institution and request to close your old account(s)
  - Request cash or check for remaining funds
- Deposit funds in your new Credit Union account

## Transition checklist—for your records/use

List all of your direct deposits and automatic payments below:

**Direct Deposits to change:**

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Automatic Payments to change:**

- Company Name: \_\_\_\_\_
- Company Name: \_\_\_\_\_
- Company Name: \_\_\_\_\_
- Company Name: \_\_\_\_\_
- Company Name: \_\_\_\_\_



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## Changing Your Automatic Payments

Changing the automatic payments that come out of your account can be a little time consuming but knowing how to change them and having the information you need can make the change easier. Refer to your transition checklist for your list of automatic payments that need changed.

You will need the following information to update your automatic payments:

- Credit Union routing number: 243380192
- Credit Union Checking account number: \_\_\_\_\_

### Updating payment information online

The best way to contact the merchant is to visit their website and log in or create your account. Typically payment methods can be updated by selecting one of the following:

- Billing information
  - Settings
  - Profile settings
  - View my bill
- Examples:
- Verizon Wireless account
  - Netflix account
  - Dish Network / Direct TV account

**IMPORTANT TIP**— Always remember to SAVE the changes you’ve made in order to insure your payment information has been updated and stored properly.

### Updating payment information by phone

Another avenue to update your payment information is to find a customer service phone number on a previous bill or on the merchants official website.

Examples: Insurance carrier, utilities— gas, electric, water

### Not Recommended

You should never send or update your payment information via email due to security reasons. It’s best to do it directly from your merchant account, in person, or by phone.



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## Change of Direct Deposit

Please give to HR / Payroll / Social Security office

### ► To whom it may concern:

Please begin depositing my:                      PAYCHECK                      SOCIAL SECURITY                      OTHER: \_\_\_\_\_

Effective: \_\_\_\_\_

To the following account:

#### CLARION FEDERAL CREDIT UNION

Account Number: \_\_\_\_\_ Routing Number:                      **243380192**

#### Please select one:

Checking

Savings

### ► If you have any questions about this request, please contact me at:

Phone: \_\_\_\_\_ Best time to call: \_\_\_\_\_

Email: \_\_\_\_\_

### ► Thank you,

Signature: \_\_\_\_\_

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_

Social Security number (last 4 digits): \_\_\_\_\_ Employee ID : \_\_\_\_\_