

# Align Credit Union Membership Switch Kit

The process to switch accounts from another financial institution to Align Credit Union is easy and convenient.

## Steps to Switch Accounts

- Print the checklist to monitor your progress.
- Open a new membership account by visiting any of our branch locations or by completing the application online at [AlignCU.com](https://AlignCU.com).
- Discontinue use of your previous account.
- Download and complete the Direct Deposit Request Form and Automatic Payment Form. Provide the necessary forms to the relevant companies or organizations currently depositing or withdrawing funds from your existing account via mail, fax, or email.
- Transfer any linked accounts, such as Venmo, PayPal, Zelle, etc.
- Close your account at your former financial institution.

Please be aware that some payees or vendors may not authorize changes to an account requested by a third party. If this applies, you may need to contact the payee or vendor directly. Should you have any questions regarding the transfer process to Align Credit Union, please visit any of our branch locations or contact us at 800-942-9575. Our team is committed to supporting you throughout your account transition.



**AlignCU.com**  
**(800) 942-9575**





## **Membership Account Switch Checklist**

### **1. Open Your New Credit Union Account**

Choose the right account type (checking, savings, etc.)

Set up online/mobile banking access

Order debit card and checks (if needed)

### **2. Stop Using Your Old Account**

Stop writing checks from the old account

Stop using old debit card

Leave enough funds to cover pending transactions

### **3. Transfer Direct Deposits**

Notify your employer/payroll provider

Update Social Security or pension deposits

Update any other recurring deposits (e.g., investment income)

### **4. Transfer Automatic Payments**

List all recurring payments (utilities, subscriptions, loans, etc.)

Update payment info with each provider

Set up bill pay in your new account (if applicable)

### **5. Move Any Linked Accounts**

Update connections to apps like Venmo, PayPal, Zelle, etc.

Update any linked savings or investment accounts

### **6. Close Your Old Account**

Confirm all checks and payments have cleared

Transfer remaining balance to your new account

Request account closure in writing

Destroy old checks and debit cards



## DIRECT DEPOSIT REQUEST FORM

Complete, print and sign this form and submit it to your employer to request direct deposit.

Member name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

**Please have my paycheck automatically deposited into my account with Align Credit Union:**

**BANK INFORMATION:**

ALIGN CREDIT UNION  
87 Hale Street  
LOWELL, MA 01851

NEW REQUEST

(Check one)

CHANGE REQUEST

ABA/ROUTING NUMBER: **211383901**

ACCOUNT NUMBER: \_\_\_\_\_

☐

CHECKING ACCOUNT

(Check one)

☐

SAVINGS ACCOUNT

I authorize my employer \_\_\_\_\_ **EMPLOYER NAME** to deposit my net pay to the financial

institution listed above. I understand that this authorization will remain in effect until written notification is received from me of its termination.

**SIGNATURE**

\_\_\_\_\_  
**DATE**

- It may take 1-2 pay cycles for the change to take effect.
- Keep your old account open until your first deposit posts to the new account.
- Contact your HR or payroll department if you have questions.



## ACH DEBIT AUTHORIZATION FORM

To: \_\_\_\_\_

From: \_\_\_\_\_

Customer Account Number with Biller: \_\_\_\_\_

I have recently changed financial institutions and request that future automatic payments be debited from my new account:

**BANK INFORMATION:**

ALIGN CREDIT UNION  
87 Hale Street  
LOWELL, MA 01851

ABA/ROUTING NUMBER: **211383901**

ACCOUNT NUMBER: \_\_\_\_\_

☐ CHECKING ACCOUNT

(Check one)

☐ SAVINGS ACCOUNT

Please update your records to begin debiting this new account for my scheduled payments.  
If you require any additional documentation, please contact me using the information below.

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

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

Phone Number: \_\_\_\_\_

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