

Helping **U** make the  
switch



## Union Community Bank Switch Kit

Welcome to Union Community Bank —we're so happy to have you with us. Everything you need for a quick and easy switch to Union Community Bank is right here. No hassles ... no hard work ... and no trips to your old bank.

Your Switch Kit includes information and forms to change direct deposits, automatic payments and close your current bank accounts:

**Switch Kit Checklist** — Get started with this simple form to make sure you notify everyone about your switch to UCB.

**Automatic Payments Authorization Letter** — An easy-to-use form letter you send to transfer all your automatic payments to your new UCB account.

**Direct Deposits Authorization Letter** — A quick form letter to ensure your direct deposits are all made to your new UCB account.

**Account Closing Letter** — A straightforward letter that lets your current bank know you're closing your account.



[unioncommunitybank.com](http://unioncommunitybank.com)



# Switch Kit Checklist



Let's get organized for your switch to UCB.

Union Community Bank Account Number: \_\_\_\_\_

Union Community Bank Routing Number: **031376101**

**IMPORTANT:**

- Before you close your former bank account(s) know that it may take a few statement cycles for all of your checks, automatic payments and withdrawals to clear.
- Determine how much money you will need to leave in the former bank account(s) to cover these transactions.

**Start checking the list:** This handy checklist of automatic payments and direct deposits will help make sure you remember everything you need to change.

Automatic Payments		Direct Deposits
<input type="checkbox"/> Mortgage/Rent	<input type="checkbox"/> Charitable Donations	<input type="checkbox"/> Payroll
<input type="checkbox"/> Car Loan/Lease	<input type="checkbox"/> Gym	<input type="checkbox"/> Retirement/Pension
<input type="checkbox"/> Cell Phone/Telephone	<input type="checkbox"/> iTunes/Google Play	<input type="checkbox"/> Social Security
<input type="checkbox"/> Credit Card(s)	<input type="checkbox"/> Department Store(s)	<input type="checkbox"/> Investment Income
<input type="checkbox"/> Electric/Gas	<input type="checkbox"/> Water Company	<input type="checkbox"/> Child Support Income
<input type="checkbox"/> Auto Insurance	<input type="checkbox"/> Rx	<input type="checkbox"/> Other Salary
<input type="checkbox"/> Health/Life Insurance	<input type="checkbox"/> Trash	<input type="checkbox"/> Other (list)
<input type="checkbox"/> Home/Renters Insurance	<input type="checkbox"/> Student Loan	<input type="checkbox"/> Other (list)
<input type="checkbox"/> Cable/Satellite TV	<input type="checkbox"/> Other (list)	
<input type="checkbox"/> Internet Service Provider	<input type="checkbox"/> Other (list)	

**Sent notifications? Check this list:** Keep track of your automatic payments and direct deposits as you contact companies to inform them of your switch to UCB.

	Company	Phone	Contact Date	Effective Date
Automatic Payments				
Direct Deposit				

# Automatic Payment Authorization Letter



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

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

\_\_\_\_\_

\_\_\_\_\_

I recently opened a new account with Union Community Bank and I would like to have my automatic payments with your company changed to my new bank account.

My new Union Community Bank account number, as well as all my other pertinent information, is listed at the bottom of this letter. If you have any questions, or if you have additional authorization forms I need to sign, please contact me at the number shown below.

This letter will serve as authorization for your company to begin making automatic payments from the Union Community Bank account indicated below effective immediately. I understand this authorization will remain in effect until I give written notification to terminate this service.

I've attached a voided check from my new Checking account. Thank you for your cooperation with this change.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Account Number with Your Company

\_\_\_\_\_  
Printed Name / Primary Account Owner

\_\_\_\_\_  
New Bank Account Number:

- Checking
- Savings

\_\_\_\_\_  
Address

New Bank Routing Number: **031376101**

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

**New Bank Address**  
Union Community Bank  
PO Box 567  
Mount Joy, PA 17552

\_\_\_\_\_  
Phone

\_\_\_\_\_  
eMail (optional)

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**This letter should be sent to all companies who automatically deduct payments from your account. Simply personalize this letter and you're good to go.**

**NOTE:** Some companies may require a specific form in order to complete the change of your automatic payments to your new account.

# Direct Deposit Authorization Letter



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

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

\_\_\_\_\_

\_\_\_\_\_

I recently opened a new account with Union Community Bank and I would like to have my direct deposits with your company changed to my new bank account.

This letter will serve as authorization for your company to begin making direct deposits into the Union Community Bank account indicated below effective immediately. I understand this authorization will remain in effect until I give written notification to terminate this service.

My new Union Community Bank account number, as well as other pertinent information, is listed at the bottom of this letter. If you have any questions, or if you have additional authorization forms I need to sign, please contact me at the number shown below.

Thank you for your cooperation with this change.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Account Number with Your Company

\_\_\_\_\_  
Printed Name / Primary Account Owner

\_\_\_\_\_  
New Bank Account Number: for Direct Deposit

\_\_\_\_\_  
Address

\_\_\_\_\_  
New Bank Routing Number: **031376101**

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

**New Bank Address**  
Union Community Bank  
PO Box 567  
Mount Joy, PA 17552

\_\_\_\_\_  
Phone

\_\_\_\_\_  
eMail (optional)

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**This letter should be sent to all companies who automatically make deposits into your account. Simply personalize this letter and you're good to go.**

**NOTE:** Some companies may require a specific form in order to complete the change of your direct deposits to your new account.

# Account Closing Letter



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

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

\_\_\_\_\_

\_\_\_\_\_

Please consider this as an official notice of my desire to close my account(s) at your bank.

I have listed all accounts I would like closed at the bottom of this letter, and I request that you send me a check for the remaining balance(s) to my address below.

If you have any questions about this request, or if you have additional authorization forms I need to sign, please contact me at the number shown below.

Thank you for your timely cooperation.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Printed Name / Primary Account Owner

\_\_\_\_\_  
Address

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

\_\_\_\_\_  
Phone

\_\_\_\_\_  
eMail (optional)

\_\_\_\_\_  
Account Number

- Checking
- Savings
- Other

\_\_\_\_\_  
Account Number

- Checking
- Savings
- Other

\_\_\_\_\_  
Account Number

- Checking
- Savings
- Other

**You can send the account closing letter below to your old bank, closing your accounts when:**

- All automatic payments and direct deposits listed on your Switch Kit have cleared.
- You have confirmed all automatic payments and direct deposits through your new Union Community Bank account have cleared.

**Simply personalize this letter and you're good to go.**