

If you are sending electronically - please password protect your document before submission.

Switch Kit

Make it an easy move!

We are happy to help you switch to Mayo Employees Federal Credit Union (MEFCU)! Just follow the four steps below to switch to great products and services.

- 1** **Open your Checking and Savings accounts at MEFCU.** Stop by any office, complete the online [Membership Application](#), or contact our Call Center at 507-535-1460 or 800-535-2129 to open accounts.
- 2** **Look over the Account Switch Checklist.** Make sure you remember to switch all direct deposits and automatic payments. Fill out a direct deposit or automatic payment form for each applicable deposit or payment you wish to switch. We recommend you review the last two months of your financial statements.
- 3** **Transfer any funds from your previous financial institution to MEFCU and complete the request to close that account.** Remember to verify that all checks and automatic withdrawals have cleared from your previous account(s).
- 4** **Send out all your information for processing.** As always, we are happy to assist you. Simply bring in or fax your completed forms to one of our member service representatives. We will review the forms to confirm all are accurate and complete. Please note other financial institutions and companies may request completion of additional forms.

Account Switch Checklist

Direct Deposit

- ☐ Payroll
- ☐ Social Security*
- ☐ Government
- ☐ Retirement
- ☐ Investments

Automatic Payments

- ☐ Mortgage
- ☐ Auto Loan
- ☐ Health Insurance
- ☐ Life Insurance
- ☐ Car Insurance
- ☐ Credit Card(s)
- ☐ Utilities
- ☐ Cable TV
- ☐ Cellular Phone
- ☐ Internet Services
- ☐ Health/Athletic Club
- ☐ Investments/Annuities
- ☐ Charitable Contributions

*Please visit ssa.gov for more information, this [page](#) details the process for changing account information.

Benefits

- Free Mobile Banking
- Free Mobile Deposit and Bill Pay
- Free Online Banking and Bill Pay
- Free Personal Financial Management Tools
- Free Telephone Banking Available
- Free Text Club
- Full Service Call Center
- Auto, Truck, Boat and RV Loans
- Private Student Loans
- 24/7 Online Loan and Membership Application
- Visa Credit and Debit Cards
- Visa Online Account Services
- Instant Issue Debit Cards
- Design Your Own Debit Cards
- \$500,000 IRA and Savings Deposit Insurance
(NCUA and Excess Share Insurance provide \$250,000 each)
- Money Orders
- Wire Transfers
- Night Depositories
- Notary and Signature Guarantee Services
- Safe Deposit Boxes
- Free Coin Counting
- Free Credit Counseling
- Brokerage and Financial Planning Services
- Family/Lifetime Membership

Switch Kit

Account Transfer

Complete this form and provide it to your current financial institution.

Your Information

Name: _____ Date: _____

Social Security Number: _____

Co-Owner/Applicant: _____

Co-Owner/Applicant Social Security No.: _____

Street Address: _____

City, State, and Zip: _____

Daytime Phone: _____

Transfer My Account From:

Name of Financial Institution: _____

Street Address: _____

City, State, and Zip: _____

Existing Account Number: _____

☐ Please close my account and send the entire account balance to me at the address noted above.

☐ Please close my account and send the entire account balance to:

Mayo Employees Federal Credit Union

130 23rd Avenue SW

Rochester, MN 55902

Please reference Account No. _____

Authorized Signature: _____ Date: _____

Co-Owners Signature: _____ Date: _____

Notary, if required: _____ Date: _____

Switch Kit

Automatic Deposit Account Change

Complete this form and provide it to each company that automatically initiates deposits into your accounts.

To: Company Name: _____
Address: _____
City, State, and Zip: _____

From: Your Name: _____
Account Number or Employee Number if applicable: _____

This memo serves as notification that I have established a new account at Mayo Employees Federal Credit Union.

Please stop making deposits to the account at:

Listed below is the relevant account and routing information needed for you to change my automatic deposit to my new Mayo Employees Federal Credit Union account.

Name of Financial Institution: Mayo Employees Federal Credit Union

Address: 130 23rd Avenue SW, Rochester, MN 55902

Mayo Employees Federal Credit Union Routing Number: 291975478

Account No. _____

Authorized Signature: _____ Phone Number: _____

Address: _____

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed above. If this form is not sufficient for automatic payments, please forward your authorized company form for my signature.

Additional copies of this form can be found online at
mayocreditunion.org/forms.html



Switch Kit

Automatic Payment Account Change

Complete this form and provide it to each company that automatically deducts payments from your accounts.

To: Company Name: _____
Address: _____
City, State, and Zip: _____

From: Your Name: _____
Account Number or Employee Number if applicable: _____

This memo serves as notification that I have established a new account at Mayo Employees Federal Credit Union.

Please stop making withdrawals from the account at:

Listed below is the relevant account and routing information needed for you to change my automatic payment to my new Mayo Employees Federal Credit Union account.

Name of Financial Institution: Mayo Employees Federal Credit Union

Address: 130 23rd Avenue SW, Rochester, MN 55902

Mayo Employees Federal Credit Union Routing Number: 291975478

Account No. _____

Authorized Signature: _____ Phone Number: _____

Address: _____

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed above. If this form is not sufficient for automatic payments, please forward your authorized company form for my signature.

Additional copies of this form can be found online at
mayocreditunion.org/forms.html

