

Welcome to greener pastures.

Your Membership Starter Kit

} Becoming a Clackamas Federal Credit Union member is quick and easy. We've been a part of Clackamas County for over 50 years now, and are here to help you – someone who lives, works, worships, or goes to school in the county – with all your financial needs and goals.

To make the switch, simply complete the **four simple steps** below. They will guide you through the necessary forms.

- 1. Provide us Your Basic Information.**
- 2. Fill out the Direct Deposit Change Notification**, if necessary.
- 3. Complete the Automatic Payment Change Notification**, if necessary.
- 4. Fill out a current Checking Account Closure Notification.**

Bring the completed forms to your neighborhood Clackamas Federal Credit Union branch. We'll do the rest. Have any questions or need further assistance? Call us at 503-656-0671.

Additional copies of these forms may be photocopied or downloaded as PDFs online at www.clackamasfcu.org.



1. Getting to know you.

Your Basic Information

} The first step in making the switch is to provide us with the information we need to set up your account. Please know that your privacy is of utmost concern to us. Your information will be kept in the strictest confidence.

PRIMARY MEMBER FIRST NAME MIDDLE LAST

SOCIAL SECURITY NUMBER

DATE OF BIRTH

DRIVER'S LICENSE NUMBER AND STATE

HOME PHONE WORK PHONE CELL PHONE

EMPLOYER

JOINT APPLICANT FIRST NAME MIDDLE LAST

SOCIAL SECURITY NUMBER

DATE OF BIRTH

DRIVER'S LICENSE NUMBER AND STATE

HOME PHONE WORK PHONE CELL PHONE

EMPLOYER

NEXT STEP: BRING THIS COMPLETED FORM, ALONG WITH ANY ADDITIONAL FORMS TO YOUR NEIGHBORHOOD CLACKAMAS BRANCH.

2. Money in the bank.

Direct Deposit Change Notification

} Direct deposit conveniently allows your paycheck, or other payments, to be automatically deposited to your checking account. This form helps switch direct deposits to your new Clackamas Federal Credit Union account.

Your employer may have its own direct deposit form, so check with your Human Resources or Payroll Department to find out. If you receive deposits other than payroll direct deposits, contact the depositor for instructions on changing these to your new Clackamas Federal Credit Union account.

DATE

SOCIAL SECURITY NUMBER

FIRST NAME

MIDDLE

LAST

NAME OF EMPLOYER

EMPLOYER'S ADDRESS

EMPLOYER'S PHONE NUMBER

PREVIOUS FINANCIAL INSTITUTION

PREVIOUS ACCOUNT NUMBER

NEW CLACKAMAS CHECKING ACCOUNT NUMBER

ROUTING NUMBER

I hereby authorize this change in direct deposit effective on the following date:

DATE

SIGNATURE

NEXT STEP: BRING THIS COMPLETED FORM, ALONG WITH ANY ADDITIONAL FORMS TO YOUR NEIGHBORHOOD CLACKAMAS BRANCH.



3. Taking care of business.

Automatic Payment Change Notification

} This form helps us notify any companies that make automatic deductions from your account (for instance, auto or health insurance). You can also use this form to direct these companies to begin automatic deductions from your Clackamas account or cancel automatic payments. Make copies of this page for each instance of automatic payment you participate in.

You can also print additional copies of this page, or any other, from the PDF document available at www.clackamasfcu.org.

DATE SOCIAL SECURITY NUMBER

FIRST NAME MIDDLE LAST

COMPANY TO RECEIVE PAYMENT AMOUNT OF PAYMENT

COMPANY ADDRESS

COMPANY PHONE

PREVIOUS FINANCIAL INSTITUTION NAME

PREVIOUS FINANCIAL INSTITUTION ADDRESS

PREVIOUS ACCOUNT NUMBER

CHECK ONE OF THE FOLLOWING

PLEASE **CANCEL** AUTOMATIC PAYMENT FROM THIS ACCOUNT - **OR** - **CHANGE PAYMENT** TO THE FOLLOWING:

NEW CLACKAMAS CHECKING ACCOUNT NUMBER ROUTING NUMBER

CLACKAMAS FEDERAL CREDIT UNION
PO BOX 2020 / OREGON CITY, OR 97045
503.656.0671 / 800.878.0671

I hereby authorize this change in direct deposit effective on the following date:

DATE SIGNATURE

NEXT STEP: BRING THIS COMPLETED FORM, ALONG WITH ANY ADDITIONAL FORMS TO YOUR NEIGHBORHOOD CLACKAMAS BRANCH.



4. Tying up loose ends.

Checking Account Closure Notification

} What does this form do? It requests the closure of an account at your current financial institution. As you transition to your new Clackamas Federal Credit Union account, be sure to leave your existing accounts active long enough to allow outstanding checks and automatic deposits to clear, and leave enough money in these accounts to cover the transactions.

DATE SOCIAL SECURITY NUMBER

FIRST NAME MIDDLE LAST

CURRENT FINANCIAL INSTITUTION NAME

CURRENT FINANCIAL INSTITUTION ADDRESS

ACCOUNT NUMBER

I hereby authorize closure of my checking account and state that all my checks have cleared on the account to be closed, and all direct deposits and automatic payments have been stopped.

PLEASE MAIL BALANCE TO:

CLACKAMAS FEDERAL CREDIT UNION

PO BOX 2020 / OREGON CITY, OR 97045

503.656.0671 / 800.878.0671

NEW CLACKAMAS CHECKING ACCOUNT NUMBER

DATE CLOSURE TO TAKE EFFECT

SIGNATURE

NEXT STEP: BRING THIS COMPLETED FORM, ALONG WITH ANY ADDITIONAL FORMS TO YOUR NEIGHBORHOOD CLACKAMAS BRANCH.