



www.oppst.org

Opportunities

CREDIT UNION

Switching to *Opportunities* is Simple!

Changing financial institutions can sometimes be difficult. Included in this packet are all the forms you'll need to shift your accounts from your old bank to *Opportunities*! Once you have opened your new Opportunities Credit Union account and have your new account number, you can start to make the switch!

This *Simple SwitchPak* will help make the transition as simple as possible!

The Basics

Name:	Opportunities Credit Union
Address:	92 North Avenue, Burlington, VT 05401
Routing Number:	011 692 588
Telephone Number:	800-865-8328 (<i>toll free</i>) or 802-865-2003

For your Old Account

Stop using your old account and allow any outstanding checks to clear. This may take 10 days or longer so be sure to do a final balancing of your account at the end of the month.

Use the "Request to Close Account" form to send to your old bank.

For your Direct Deposit

- Paycheck
 - Included is a Direct Deposit form. Please complete this form and submit it to the Payroll/Human Resources Department at your workplace.
- Social Security Benefits
 - Please call Social Security at 1-800-772-1213 or go online to www.godirect.gov. They will need your account number, routing number, and social security number.
 - We can place the call for you from our office, but they will need to speak with you directly to verify your request.

Please note: It can take up to three weeks to be processed, if possible you should time your request for just after you receive your payment

For your Automatic Debits/Credits

- Included is a Change of Electronic Transaction form. Please complete this form and submit it to the corresponding company.

92 North Avenue, Burlington, VT 05401
 P: 802.865.2003 or 800.865.8328 F: 802.860.6123
www.oppst.org



www.oppsvt.org

Simple SwitchPak

Opportunities

CREDIT UNION

Current Account Relationships

I have the following accounts at my present institution(s):

Checking Accounts

Account Number _____

Approximate Balance \$ _____

Institution Name _____

Money Market Accounts

Account Number _____

Approximate Balance \$ _____

Institution Name _____

Savings Accounts

Account Number _____

Approximate Balance \$ _____

Institution Name _____

Certificates of Deposit

Account Number _____

Approximate Balance \$ _____

Institution Name _____

Other Accounts

Account Type _____

Account Number _____

Approximate Balance \$ _____

Institution Name _____



www.oppsvt.org

Opportunities CREDIT UNION

Request to Close Account

To: _____
(Name of Financial Institution)

From: _____
(Name of Account Holder)

(Street Address, City, State, Zip Code)

Date: _____

Re: Account closing and transfer of funds

Account Number Type of Account Account Title

Account Number Type of Account Account Title

Effective immediately, please close the above account(s). The balance in my account(s) should be aggregated and then mailed, in the form of a Bank Check, to:

Opportunities Credit Union
Attention: Member Services
92 North Avenue
Burlington, VT 05401

Account Number: _____
(New Account Number)

For the Benefit Of: _____
(Account Name)

Thank you for your assistance in making this change.

Sincerely,

(Customer's Signature)

(Daytime phone number)



Opportunities

CREDIT UNION

www.oppsvt.org

Direct Deposit Switch Form

To: _____
(Name of Employer)

From: _____
(Your Name)

Date: _____

Re: Transfer of Direct Deposit

Effective immediately, please transfer my direct deposit to my new account at:

Opportunities Credit Union
92 North Ave.
Burlington, VT 05401

Routing Number: 011692588

Account Number: _____

Thank you for your assistance in making this change.

Sincerely,

(Signature)

(Print Your Name Here)

(Print Your Address Here)

(Daytime Telephone Number)



Opportunities

CREDIT UNION

www.oppstvt.org

Automatic Payment/Deposit Update

Automatic Payment

Automatic Deposit

To: _____
(Name of Company)

From: _____
(Your Name)

Date: _____

Re: Transfer of Automatic Transaction (ACH Payment)

Effective immediately, please transfer my automatic transactions to my new account at:

Opportunities Credit Union
92 North Ave.
Burlington, VT 05401

Routing Number: 011692588

Account Number: _____

Thank you for your assistance in making this change.

Sincerely,

(Signature)

(Print Your Name Here)

(Print Your Address Here)

(Daytime Telephone Number)