



Ready to make the switch?

Quest Federal Credit Union Switch Kit

A handy guide to help you switch.

Thanks for your interest in switching to Quest Federal Credit Union. We're excited to see you join us and we hope we can help make your transition as smooth as possible.

If you have any questions or need assistance, please contact us at 800-333-9571 or visit our website and use the Contact Us form or Live Chat options!

1

Open your account

Opening your account can be done in person at any branch location or by completing the membership opening process online at the following address:

<http://www.questfcu.com/join>

To start your account at Quest Federal Credit Union, you will need to fund your account with at least \$5.00, this is your ownership share (membership par value) and your account will need to remain open for 365 days or the required minimum will be forfeited to Quest Federal Credit Union.

By signing this form, you authorize Quest Federal Credit Union to transfer money from your current checking account for the amount specified.

Name

Routing Number

Account Number

Amount

Signature

Date

2

Direct Deposit Form



Use the following form to set up and authorize direct deposits with any new companies or individuals.

Name: _____

Social Security Number: _____

Address: _____

Company Name: _____

Company Address: _____

Primary Deposit Instructions:

Account Number: _____

Account Type: Checking Savings Other

Secondary Deposit Instructions:

Account Number: _____

Account Type: Checking Savings Other

I hereby authorize direct deposit to be sent to my Quest Federal Credit Union Checking Account.

Quest Federal Credit Union

12837 US Highway 68

Kenton, OH 43326

Routing Number: 241279292

Signature: _____

Date: _____

Signature: _____

Date: _____

Joint Owner, if applicable



Direct Deposit Change



Send written notices to companies with which you have direct deposit (employer, government deposits, pension, transfers from other financial institutions, investment dividends, child support or court-issued deposits, etc.) notifying them that you want to switch your direct deposits to your new account at Quest Federal Credit Union.

To: _____

From: _____

Address: _____

Social Security Number: _____

I hereby authorize direct deposit to be sent to my Quest Federal Credit Union Checking Account. I have attached a copy of a new voided check for reference. Please make this change effective as of: ____/____/____.

Please discontinue sending my automatic direct deposit to:

Previous Financial Institution

Name: _____

Account: _____

Address: _____

New Financial Institution

Quest Federal Credit Union

12837 US Highway 68

Kenton, OH 43326

Routing Number: 241279292

Signature: _____

Date: _____

Signature: _____

Date: _____

Joint Owner, if applicable

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Automatic Payments



If you currently have automatic payments linked to your existing checking or savings accounts, you should notify them that the account will be closing and that you will be changing future payments to be withdrawn from Quest Federal Credit Union.

Review this list for payments you may be making automatically. Once you have notified them, you can use the following form to authorize payment from your new Quest Federal Credit Union account(s).

- Mortgage
- Other Loans (auto, RV, boat, etc.)
- Investments
- Telephone/Cellular Phone
- Utilities (Gas, Electric, Water, Sewer, etc.)
- Cable or Satellite Providers
- Internet Service Provider
- Charities
- Gym Memberships
- Credit Card Companies
- Netflix, Amazon, Apple, Pandora, Spotify, (other media streaming sites), etc.

>> See form on page 5

B. Authorize Automatic Payments

If you currently have automatic payments linked to your existing checking or savings accounts, you should notify them that the account will be closing and that you will be changing future payments to be withdrawn from Quest Federal Credit Union.

Review this list for payments you may be making automatically. Once you have notified them, you can use the following form to authorize payment from your new Quest Federal Credit Union account(s).

>> See form on page 6

Cancel Automatic Payments



Authorization to Cancel Automatic Payment

Date: _____

Vendor Name: _____

Vendor Account No: _____

I am submitting this form to inform you that of a change in my banking relationship concerning the account number found above.

I currently have my payment automatically withdrawn from my account at the following institution. I would like to cancel these monthly transactions, and submit this letter as written notification of that intention.

Current Financial Inst.: _____

Current Account No.: _____

I understand that I need to give you at least two weeks notice prior to the next scheduled transaction. Therefore, I expect the last transaction to be the one dated: _____

Thank you for your prompt attention to this request.

Sincerely,

Signature: _____

Date: _____

Signature: _____

Date: _____

Joint Owner, if applicable

Name: _____

Address: _____

Phone Number: _____

Automatic Payment Authorization



Authorization for Automatic Payment

Name: _____

Phone Number: _____

Address: _____

Quest Federal Credit Union
12837 US Highway 68
Kenton, OH 43326
Routing Number: 241279292

New Financial
Institution Information:

Account Number: _____

Account Type: Checking Savings Other

Vendor Name: _____

Vendor Account No: _____ Payment: _____

I (we) hereby authorize aforementioned Vendor to redirect future automated payments to/from my Quest Federal Credit Union account. I have attached a copy of a new voided check for reference. Please make this change effective as of: ____/____/____.

This authorization is to remain in effect until I notify the aforementioned Vendor in writing and with a reasonable opportunity to act. I agree that I remain obligated to pay for these services in the event that a change to my account is dishonored, for whatever reason.

Signature: _____

Date: _____

Signature: _____
Joint Owner, if applicable

Date: _____

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Account Closure Authorization



Name:

Telephone:

Joint Owner:

Previous Financial Institution

Name:

Account No.:

Address:

Please mail/transfer balances to:

Quest Federal Credit Union

12837 US Highway 68

Kenton, OH 43326

Routing Number: 241279292

I hereby authorize the closure of my account. I have verified all my outstanding checks have cleared and all previous direct deposits and automatic payments have been stopped.

Signature:

Date:

Signature:

Date:

Joint Owner, if applicable