

**Switching to Summit Credit Union is fast and easy.**

**Just follow the simple steps below.**

**Need help? Call us at 608-243-5000/800-236-5560 and we'll be happy to assist you.**

**1 Open a new Summit checking account**

You'll need to provide certain information about your new Summit account to switch your account from your old financial institution. Your new account information is:

**Checking number (MICR):** \_\_\_\_\_  
**Name of Financial Institution:** Summit Credit Union  
**City and State:** Madison, WI 53718  
**Bank Transit Number:** 275979034  
**Credit Union Contact:** \_\_\_\_\_  
**Credit Union Contact Number:** 608-243-5000/800-236-5560, Ext \_\_\_\_\_

**2 Stop using your old checking account**

Stop writing checks from your old account and make sure to leave sufficient funds in your former account to cover all outstanding checks, automatic payments, and bill payer withdrawals.

Destroy any unused checks, old ATM and debit cards as well as any deposit slips, or if you'd like – bring them into any Summit Credit Union branch location and we'll destroy them for you.

**3 Switch over your automatic deposits, withdrawals, and payments**

Review several months of account statements or online history and identify all automatic deposits and/or deductions. Examples include your payroll direct deposit, investment deposit, insurance payments, utility bills, cable bills, etc. Notify these companies of your new checking account information. Typically you'll need to provide the information listed in Step 1 above to make the change. Notification can usually be handled via phone, company website or mail. Send the [Direct Deposit Change Form](#) to your employer's human resource department, the company handling your retirement or pension payments, or the Social Security Administration.

**4 Close your former checking account**

Once you're sure all activity has cleared your old account, send the [Close Account Form](#) to your old financial institution requesting your remaining balance in that account. Simply fill in the date you want to close your account, enter your old financial institution name and address and account number, sign your name and mail the form.

You're done!

