



DuGood  
Credit Union

# SWITCH KIT

## EXPERIENCE THE DUGOOD DIFFERENCE!

Switching your accounts to DuGood is easy. Using the forms in this guide will keep you organized and help make the transition stress free!

Complete your switch electronically with ClickSWITCH:  
[www.dugood.org/clickswitch](http://www.dugood.org/clickswitch)

### What's Included

- Welcome
- 5 Step Switch Kit
- Transaction Checklist
- Direct Deposit Authorization Form
- Automatic Payment Authorization Form
- Account Closing Authorization Form

Let's get started!



# ACCOUNT OPTIONS

Welcome to DuGood Credit Union! We have a rich history of serving Texans since 1962, and are proud to offer the latest in financial services and a full suite of lending solutions customized to fit your needs. We've been helping families and businesses build a better future for generations, and we look forward to serving you!

## SAVINGS ACCOUNTS

- Regular Savings
- DuPup Club (ages 0-9)
- DuPlus (ages 55+)
- IRAs and Certificates
- Health Savings
- Christmas Club
- Money Market

## CHECKING ACCOUNTS

- Basic Checking
- Student Checking (ages 10-18)
- LIT Checking
- Advantage Checking (ages 18+)
- Hi-Yield Checking
- Debit Cards With Rewards
- Student Debit Cards  
with Scholarship Rewards
- Round Up Automatic Savings Program

## DIGITAL SERVICES

- Account Alerts
- Apple/Google/Samsung Pay
- Bill Pay
- Card Controls
- ClickSWITCH (Move Direct Deposits)
- CardSWAP (Update Recurring Payments)
- eStatements
- Money Management
- Online Account Opening
- Online Banking/Mobile App
- Remote Deposit
- Zelle®

## CONSUMER LOANS

- Auto Loans
- Recreational Vehicles
- Debt Consolidation
- Credit Cards with Rewards
- Signature Loans

## REAL ESTATE LOANS

- Mortgage Loans
- Home Equity Loans
- Refinances
- Land Loans
- Construction Loans
- Homeowners Express Loans

## BUSINESS ACCOUNTS AND LOANS

- Business Savings and Checking
- Certificates
- Money Market
- Business Lines of Credit
- Business Credit Cards
- Commercial Real Estate
- Construction & Development
- Equipment
- Investment Properties

# 5 STEP SWITCH KIT

The following forms have been created for you to help make the process of switching your account(s) easier.

Important: Make sure to keep sensitive account information secure, and if printed, consider shredding upon completion. Email communication is not always secure, when transmitting documentation, ask for a secure, encrypted email address.

## 1. Open Your New DuGood Account

Visit any of our convenient locations and a dedicated representative will happily assist you in establishing your new account with us.

## 2. Get Organized

Use your hassle-free Switch Kit to organize the transactions that will be switched to your new DuGood Credit Union account.

## 3. Transfer Your Direct Deposits

Send **Form 1: Direct Deposit Authorization Form** to your employer and other sources so your funds can be automatically deposited to your account. If you have Direct Deposits going elsewhere, you can also use this form to switch them to your account.

## 4. Move Your Automatic Payments

Send **Form 2: Automatic Payment Authorization Form** to each of your creditors to switch any automatic payments so they'll come out of your new DuGood Credit Union account.

## 5. Say "Goodbye" to Your Old Account

Use **Form 3: Account Closing Authorization Form** to notify your previous financial institution to close your account and let them know how to disburse any of your remaining funds. Make sure your checks and debits have cleared BEFORE you close your old account.

Please note: DuGood Credit Union cannot guarantee that these forms will be accepted in every instance. Your previous financial institution and/or your service partners may require you to make any of these requests in person or another method than mail. They may also require more or different information than is contained on the forms provided.

If you have any questions or concerns during this process, please do not hesitate to contact us:

- Stop by any DuGood Credit Union branch.
- Call us at (409) 899-3430 to speak with one of our friendly representatives.



# TRANSACTION CHECKLIST

## Get Organized

**Helpful Tip:** For reference, gather your most recent statement from your old financial institution. You may even want a couple months worth. If applicable, include statements/information for utility payments, loan payments, health club memberships, etc. you have set up with your old account.

**DIRECT DEPOSITS:** List all direct deposits to your account(s).

| DEPOSIT TYPE         | COMPANY/INSTITUTION NAME | ACCOUNT NUMBER | AMOUNT | DATE |
|----------------------|--------------------------|----------------|--------|------|
| Employer Payroll     |                          |                |        |      |
| Social Security      |                          |                |        |      |
| Pension/Retirement   |                          |                |        |      |
| Investment/Brokerage |                          |                |        |      |
|                      |                          |                |        |      |
|                      |                          |                |        |      |
|                      |                          |                |        |      |

**AUTOMATIC PAYMENTS/TRANSFERS:** List all withdrawals from your account(s).

| WITHDRAWAL TYPE     | COMPANY/INSTITUTION NAME | ACCOUNT NUMBER | AMOUNT | DATE |
|---------------------|--------------------------|----------------|--------|------|
| Home/Auto Insurance |                          |                |        |      |
| Life Insurance      |                          |                |        |      |
| Gas/Electric        |                          |                |        |      |
| Phone               |                          |                |        |      |
| Water               |                          |                |        |      |
| TV/Internet         |                          |                |        |      |
| Mortgage            |                          |                |        |      |
| Credit Card         |                          |                |        |      |
| Auto Loan           |                          |                |        |      |
|                     |                          |                |        |      |
|                     |                          |                |        |      |

## FORMER ACCOUNT ACTIVITY TRACKING

You will want to keep track of the activity on your old account. Make sure that all checks, deposits, automatic payments, debit card transactions and ATM withdrawals have cleared before closing the account.



# FORM 1: Transferring Direct Deposits

To transfer your direct deposit, send **Form 1: Direct Deposit Authorization Form** to your employer and any other sources, so your funds can be automatically deposited to your DuGood Credit Union account. Please contact your employer's payroll department if you have questions about their process.

For Social Security deposits, a DuGood Credit Union representative can assist you with calling the Social Security Administration at (800) 333-1795 or signing up online at [ssa.gov/deposit](https://ssa.gov/deposit).

*\*Tip: Be sure to include a voided DuGood Credit Union check with this form. One of the starter checks you received when you opened your account will be fine. Please feel free to make as many copies of these forms as you need.*

# FORM 1: Direct Deposits

## Direct Deposit Authorization Form

**Attention:** (Enter the company you want deposits directed from here)

|         |       |          |
|---------|-------|----------|
| NAME    |       |          |
| ADDRESS |       |          |
| CITY    | STATE | ZIP CODE |

**From:** (Enter your personal information here)

|                                      |       |              |
|--------------------------------------|-------|--------------|
| CUSTOMER NAME                        |       |              |
| CUSTOMER ADDRESS                     |       |              |
| CITY                                 | STATE | ZIP CODE     |
| SOCIAL SECURITY NUMBER (IF REQUIRED) |       | PHONE NUMBER |

\*NOTE: For Social Security deposits, a DuGood Credit Union representative can assist you with calling the Social Security Administration at (800) 333-1795 or signing up online at [ssa.gov/deposit](http://ssa.gov/deposit).

**To Whom It May Concern,**

**I have recently switched financial institutions. Please stop making deposits into my old account and begin making them to my new DuGood Credit Union account indicated below.**

**New Account Information:** (Enter your DuGood Credit Union information here)

|                                    |                                   |                                  |
|------------------------------------|-----------------------------------|----------------------------------|
| DUGOOD CREDIT UNION ROUTING NUMBER | 313186679                         |                                  |
| ACCOUNT NUMBER                     | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| ACCOUNT NUMBER                     | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| SIGNATURE                          | DATE                              |                                  |

DEPOSIT:  Total Amount  \$\_\_\_\_\_ into CHECKING account listed above

DEPOSIT:  Total Amount  \$\_\_\_\_\_ into SAVINGS account listed above

\*Tip: Be sure to include a voided DuGood Credit Union check with this form. One of the starter checks you received when you opened your account will be fine.



## **FORM 2: Transferring Automatic Payments**

Use Form 2: Automatic Payment Authorization Form to request the transfer of your automatic payment(s) to your DuGood Credit Union account, or to establish a new automatic payment from your new DuGood Credit Union account. Please allow sufficient time for your first payments to be activated.

*\*Tip: Be sure to include a voided DuGood Credit Union check with this form. One of the starter checks you received when you opened your account will be fine. Please feel free to make as many copies of these forms as you need.*

# FORM 2: Automatic Payments

## Automatic Payment Authorization Form

**Attention:** (Enter the company you want payments directed to here)

|         |       |          |
|---------|-------|----------|
| NAME    |       |          |
| ADDRESS |       |          |
| CITY    | STATE | ZIP CODE |

**From:** (Enter your personal information here)

|                  |       |                |
|------------------|-------|----------------|
| CUSTOMER NAME    |       | ACCOUNT NUMBER |
| CUSTOMER ADDRESS |       | PHONE NUMBER   |
| CITY             | STATE | ZIP CODE       |

**To Whom It May Concern,**

**I have recently switched financial institutions. Please direct my automatic payments from my old account and begin withdrawing from my new DuGood Credit Union account indicated below.**

EFFECTIVE:       Immediately       Beginning \_\_\_\_/\_\_\_\_/\_\_\_\_

PAY:               Total Amount       \$\_\_\_\_\_

**New Account Information:** (Enter your DuGood Credit Union information here)

|                                    |                                   |                                  |
|------------------------------------|-----------------------------------|----------------------------------|
| DUGOOD CREDIT UNION ROUTING NUMBER | 313186679                         |                                  |
| ACCOUNT NUMBER                     | <input type="checkbox"/> Checking | <input type="checkbox"/> Savings |
| SIGNATURE                          | DATE                              |                                  |

**\*Tip:** Be sure to include a voided DuGood Credit Union check with this form. One of the starter checks you received when you opened your account will be fine.



## **FORM 3: Closing Old Accounts**

It's time to say goodbye to your old accounts! Use **Form 3: Account Closing Authorization Form** to request your previous financial institution close your account(s) and give directions on how to disburse any of your remaining funds.

Prior to closing those accounts, ask them if there are any fees associated with closing them. Make sure all of your checks and debits have cleared **BEFORE** you close your old account.

# FORM 3: Account Closing

## Account Closing Authorization Form

**Attention:** (Enter your old financial institution's information here)

NAME

ADDRESS

CITY

STATE

ZIP CODE

**To Whom It May Concern,**

**Please accept this letter as authorization and close my account(s) listed below with your institution.**

**Please issue a cashier's check in my name for the remaining balance(s) along with all accrued interest (if applicable).**

| ACCOUNT TYPE | ACCOUNT NUMBER | ACCOUNT OWNER NAME(S) |
|--------------|----------------|-----------------------|
|              |                |                       |
|              |                |                       |
|              |                |                       |
|              |                |                       |
|              |                |                       |
|              |                |                       |
|              |                |                       |

**Please send all closing balances to:** (Enter your personal information here)

NAME

PHONE NUMBER

ADDRESS

CITY

STATE

ZIP CODE

PRIMARY ACCOUNT OWNER SIGNATURE

DATE

SECONDARY ACCOUNT OWNER SIGNATURE

DATE

# THANK YOU FOR CHOOSING DUGOOD!

## We Look Forward to Serving You.

### Beaumont

7505 Eastex Fwy.  
Beaumont, TX 77708

1795 N. Major Dr.  
Beaumont, TX 77713

### Edison Plaza

350 Pine St.  
Beaumont, TX 77701

### Lamar Institute of Technology

855 E. Lavaca St.  
Beaumont, TX 77705

**Student Financial Center**  
West Brook High School

### Jasper

1061 S. Wheeler  
Jasper, TX 75951

### Lumberton

695 N. Main St.  
Lumberton, TX 77657

### Mont Belvieu

9205 Eagle Dr.  
Mont Belvieu, TX 77523

### Nederland

2708 Nederland Ave.  
Nederland, TX 77627

### Mortgage Center

4008 N. Twin City Hwy.  
Nederland, TX 77627

### Orange

6895 IH-10 East  
Orange, TX 77630

### Port Neches

2501 Nall St.  
Port Neches, TX 77651

### Vidor

1430 N. Main St.  
Vidor, TX 77662

Account Access at Thousands  
of Locations Across the Country



Find one near you at [co-opsharedbranch.org](http://co-opsharedbranch.org)

Account Access and More  
with DuGood's Mobile App



or get it at [m.dugood.org](http://m.dugood.org)

**Email** [dugood@dugood.org](mailto:dugood@dugood.org) // **Live Chat** [www.dugood.org](http://www.dugood.org)

(409) 899-3430

(409) 886-0726

(409) 489-0300

(281) 385-8010