Welcome and thank you for choosing Southland Credit Union! To help you with a smooth transition, follow the simple steps below to switch your previous checking to a new Southland Checking Account.

**Begin the Process**
- Open your Southland Checking Account.
- Stop writing checks from your old account and allow enough time and funds for all checks or automatic payments to clear.
- Review your last few statements and note all automatic payments. *(Not all automatic payments occur monthly and may be established as bi-monthly, quarterly, or annual payments).*

**Change Your Direct Deposit & Automatic Payments**
- Change your Direct Deposit by completing the Southland Direct Deposit Transfer form (B) enclosed. *(You may be asked to complete an additional form by the party making the deposit).*
  — For Social Security Direct Deposits, contact the Social Security Administration at 1.800.772.1213 or visit www.ssa.gov/deposit/howtosign.htm
- Set up new Automatic Payments by completing the Southland Automatic Payment Transfer form (C) enclosed, or consider Southland eServices to make FREE bill payments online at www.SouthlandCU.org.

**Close Your Old Account**
- Confirm all checks and automatic payments have cleared. Ask your previous financial institution to send you the balance from that account.
- Complete the Account Closure Request form (D) enclosed and send to your previous financial institution.
- Destroy your old checks, ATM/Debit and credit cards and deposit slips after you have closed your old account.
- Begin using your Southland Checking Account exclusively.

**Keep Copies for Your Records**
- Keep a copy of all documents and forms for your personal records.

**Questions?**
We’re here to help make the switch easy. If you have a question, visit one of our branches or contact us and we’ll be glad to help.

800.426.1917  |  www.SouthlandCU.org
Direct Deposit Transfer FORM

☐ Make copies for every party initializing a Direct Deposit to your new Southland Checking Account (i.e. employer, company).

☐ Complete information below and give each signed form, along with a voided check from your new Southland Checking Account, to the party making the Direct Deposits.

Company Name______________________________________________________________
Address____________________________________________________________________________________
City__________________________________________ State______ Zip_________ Phone_________________

Your Name____________________________________ Employee ID/Account #__________________________
Social Security #______________________________
Address____________________________________________________________________________________
City__________________________________________ State______ Zip_________ Phone_________________

Southland Credit Union
Routing # 322078325

If you wish, you can route your Direct Deposit to more than one Account.

Account Type
☐ Southland CHECKING
☐ Southland SAVINGS

Account Type
☐ Southland CHECKING
☐ Southland SAVINGS

Account # ________________________________ Account # ________________________________

Amount $ or % (circle one)____________________ Amount $ or % (circle one)____________________

I authorize ___________________________________________(employer/company) to make deposits directly to my Southland Credit Union Account(s) as indicated above, and authorize Southland to accept such deposits.

Member Signature_________________________________________________Date_________________________
Automatic Payment Transfer FORM

Date______________________________________________________________

To Company/Institution________________________________________________

Address________________________________________________________________

City____________________________________________________State______Zip__________________

To Whom It May Concern

Please change my payment instructions. Currently, you are debiting payment from my old bank account at:

Name______________________________________________________________

Routing #___________________________ Account #________________________

IMPORTANT

As of___________________________(date), please stop debiting the account above and begin debiting this payment from my new Account at Southland Credit Union.

Southland Credit Union

Routing #___________________________ Account #________________________

Please send me a written confirmation of the date this change will be effective in the system.

Signature: X

Print Name______________________________

Account Number with Company________________________

Address________________________________________________________________

City____________________________________________________State______Zip__________________

Your details
Account Closure Request FORM

Date_______________________________________________________________________________________

Financial Institution Name_____________________________________________________________________

Address____________________________________________________________________________________

City____________________________________________________ State__________Zip_________________

To Whom It May Concern

Please close the Account(s) listed below as of ____________________________________________________________________________(date).

☐ Close the Account(s) noted below and MAIL the balance and any interest earned to my address.

☐ Close the Account(s) as noted below and WIRE the balance and any interest earned to my new Southland Credit Union Account. Complete attached Incoming Wire Transfer form E.

Old Account #_________________________________ Old Routing #________________________________
to Southland Credit Union
New Account #_______________________________ New Routing # 322078325

Old Account #_________________________________ Old Routing #________________________________
to Southland Credit Union
New Account #_______________________________ New Routing # 322078325

Old Account #_________________________________ Old Routing #________________________________
to Southland Credit Union
New Account #_______________________________ New Routing # 322078325

Upon closure of the Account(s), please send a confirmation to the address below

Signature_____________________________________________________________________________________

Print Name____________________________________________________________________________________

Address_____________________________________________________________________________________

City____________________________________________________ State________ Zip_____________________

Southland CREDIT UNION

P.O. Box 3003
Los Alamitos, CA 90720-1303
800.426.1917

Revised: 4/2016
Incoming Wire Transfer FORM

The following instructions cover the wire transfer of funds from another financial institution for credit to a Southland Credit Union Account.

WIRE FUNDS TO
Southland Credit Union
10701 Los Alamitos Blvd.
Los Alamitos, CA 90720

ABA# 322078325

ATTENTION
Southland Member Name__________________________________________________________
Southland Member Account #_______________________________________________________

WHERE TO APPLY FUNDS
☐ Southland Savings Share ID #_____________________________________________________
☐ Southland Checking Share ID #____________________________________________________

TYPE OF FUNDS TO BE WIRED
☐ Loan Payment
☐ Deposit
☐ Other__________________________________________________________

FEES AND CUTOFF TIME
• Southland Credit Union does charge an incoming wire transfer fee of $10.00
• INCOMING WIRE TRANSFERS DAILY CUTOFF TIME IS 3:00 PM PST.
• Wires received after 3:00 PM will be credited the following business day.
ePay—Pay Your Bills Online FREE

ePay offers a convenient way to pay your bills online at Southland’s secure website. Choose when to pay your bills, the payment amount, schedule recurring payments and edit or delete as needed. View your transactions online and receive an electronic receipt of all payments submitted to your payees.

LOG IN
To access ePay, visit www.SouthlandCU.org and click on the eBranch Login button to the right side of your screen. Follow instructions for first time users.

SET UP YOUR PAYEES
Before you can make any online bill payments, you will need to set up your Payees. There are some Payees that are not allowed through this service such as tax payments and court ordered payments.

OPTION A—Add a Payee from provided list
To add a Payee, click on the Payees link, then click on the Activate Bill Pay button. For your convenience, we’ve compiled a list of many national and frequently used Payees. Simply click on the drop-down box under Option A to add one of these Payees. You’ll then need to enter your account number with each Payee, the name on the account, and a nickname for the Payee.

OPTION B—Add a Payee not listed under Option A
To pay an individual or company that is not listed under Option A, simply enter your Payee’s name, a nickname, billing address, phone number and your account number. Once you have entered the requested information, click the Add Payee button to add them to your Payee list.

SINGLE PAYMENT
Click New Payment from the Payments menu. Select Frequency to create a one time payment. Choose your Payee, confirm the account number, enter the date, and the amount. Then select the Submit Payment button.

MULTIPLE PAYMENTS
Choose the Multiple Payments option and select your Payees from the drop-down box. Enter the payment amount and date for each payee you wish to pay. Select the Submit Payments button and enjoy the convenience of paying several bills quickly!

RECURRING PAYMENTS
For recurring payments such as a mortgage or car payment, click New Payment and select the payment Frequency from the drop-down list. Select the Payee, confirm your account number and enter the payment amount. Enter the first payment date, the last payment date, or the total number of payments to be made.

DELETE OR CHANGE PAYMENTS
To delete or change a scheduled payment, choose the Scheduled Payments screen, click the Change or Delete icon next to the Payee.

NEED HELP?
Click on the Help link for answers to frequently asked questions or call Member Services at 800.426.1917 (M-F, 8am-6pm), or email info@SouthlandCU.org.
eTransfers—Account-to-Account Transfers Online

eTransfers is a convenient and secure way to transfer money into your accounts without driving to a branch or completing paperwork. You can electronically withdraw funds from accounts at other financial institutions, and transfer them online to your Southland Account for FREE.

LOG IN
To access eTransfers, visit www.SouthlandCU.org and click on the eBranch Login button to the right side of your screen. Log into your Southland Account.

SET UP YOUR TRANSFER ACCOUNTS
Choose Transfers from the top menu, then select Manage eTransfers. Click on Add a New Account from the menu. Follow prompts to set up your transfer accounts.

ACCOUNT & ROUTING NUMBERS
You’ll need your Account and Routing numbers which are found at the bottom of your check. Routing numbers are the first nine digits of the series, beginning with a number between 01 and 12 or 21 and 32. Southland Credit Union’s Routing number is 322078325.

FRAUD PREVENTION PROCESS
To keep your accounts safe, Southland will need to verify your external account has the same ownership name as your account with Southland. This verification can be done by faxing a copy of a check or statement on your external account to our Account Services Department at 866-496-5134. Within a few days of submitting this verification, you will receive a notification that two small deposits have been made to your external account. Please complete the setup of your external account within 30 days of receiving this notification by returning to the Manage External Accounts page and verify the amount of the deposits.

NEED HELP?
Click on the Help link for answers to frequently asked questions, call Member Services at 800.426.1917 (M-F, 8am-6pm), or email info@SouthlandCU.org.