

It's easy to switch to Southland Switch Kit • Checking

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.

1

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).

2

Change Your Direct Deposit & Automatic Payments

- Change your Direct Deposit by completing the Southland Direct Deposit Transfer form 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 enclosed, or consider Southland eServices to make FREE bill payments online at www.SouthlandCU.org.

3

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 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.

4

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.

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Switch Kit • Direct Deposit

- 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 Details

Company Name _____

Address _____

City _____

State _____

Zip _____

Phone _____

Your Details

Your Name _____

Employee ID /
Account # _____

Social Security # _____

Address _____

City _____

State _____

Zip _____

Phone _____

Southland Details

Southland Credit Union Routing #: 322078325

Deposit Details

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

Account Type

Southland Checking

Southland Savings

Account # _____

Amount _____

Account Type

Southland Checking

Southland Savings

Account # _____

Amount _____

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 _____

It's easy to switch to Southland Switch Kit • Automatic Payment Transfer

To Company Payee

Date _____ To Company / Institution _____
Address _____
City _____ State _____ Zip _____

Former Financial Institution

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.

Current Southland Account

Southland Credit Union
Routing # 322078325 Account # _____

Jane Doe 123 Rainbow St. Any City, CA 12345	Date _____	1234
Pay to the order of _____	\$ _____	Dollars
SAMPLE		
		
⑆ 322078325 ⑆ 1234567891234 ⑆ 1234		
Routing #	Account #	Check #

Your Details

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

Signature _____ Print Name _____

Account Number with Company _____

Address _____

City _____ State _____ Zip _____

It's easy to switch to Southland Switch Kit • Account Closure Request

Former Financial Institution

Date _____ Financial Institution _____

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**.

Account 1

Old Account # _____ Old Routing # _____

To Southland Credit Union

New Account # _____ New Routing # 322078325

Account 2

Old Account # _____ Old Routing # _____

To Southland Credit Union

New Account # _____ New Routing # 322078325

Account 3

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 _____

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Switch Kit • Incoming Wire Transfer

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.

It's easy to switch to Southland Switch Kit • ePay

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 SouthlandCU.org and click Register in the eBranch login box at the top right of the page. Follow the on-screen instructions to register, then login to eBranch and click ePay.

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
Search the network of payees using the search tool inside ePay.

OPTION B—Add a Payee not listed under Option A
If the payee cannot be found in the database, click Enter the info from your bill to enter the information manually.

Payments

Once you haven entered your payee's information, you can choose to make a single payment, multiple payments, or recurring payments. Simply enter the amount you wish to pay, the number of payments, and the payment date(s).

Delete or Change Payments

To delete or change a scheduled payment, return to ePay in eBranch and select a payment to make a change or remove.

Need Help?

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

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Switch Kit • eTransfers

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 SouthlandCU.org and log in to eBranch.

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.

Jane Doe
123 Rainbow St.
Any City, CA 12345

Date _____

Pay to the order of **SAMPLE** \$ _____
Dollars

Southland
CREDIT UNION

⑆ 322078325 ⑆ 1234567891234 ⑆ 1234

Routing # Account # Check #

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 icon in eBranch for answers to frequently asked questions, call Member Services at 800.426.1917 (M-F, 8am-6pm), or email info@SouthlandCU.org.