



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

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

CONSUMER LOANS

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

CHECKING ACCOUNTS

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

REAL ESTATE LOANS

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

DIGITAL SERVICES

- Account Alerts
- Alexa Voice Banking
- Apple/Google/Samsung Pay
- Bill Pay
- ClickSWITCH & CardSWAP
- Online Card Control with CardValet
- eStatements
- Money Management
- Online Account Opening
- Online Banking/Mobile App
- Remote Deposit
- Zelle®

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.



Federally insured by NCUA. Equal Housing Lender.

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.

**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.

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

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

Student Financial Center

West Brook High School

Account Access at Thousands
of Locations Across the Country



Find one near you at co-opsharedbranch.org

Account Access and More
with DuGood's Mobile App



or get it at m.dugood.org

Email dugood@dugood.org // **Live Chat** www.dugood.org

(409) 899-3430

(409) 886-0726

(409) 489-0300

(281) 385-8010