



Switch Now!

STEP 1:

Switching your account to NBTA Credit Union has never been easier. The “Step 1” page is to help you get all of your pre-authorized payments and direct deposits organized. It is also to keep record of which payments have been switched and which payments have not.

STEP 2:

Complete the “Step 2” form for each of your pre-authorized payments and/or bill payees and direct deposit plans that apply to you and mail/fax the form to each of the billers.

NOTES AND TIPS:

- Some billing companies can take 2-4 weeks to process your request. Before closing your previous account, be sure to make sure a payment has come out of your NBTA Credit Union account.
- Do you know your account number? We’ve entered the Transit and IAS number on “Step 2” but you need to enter your **8-digit** account number. Your account number looks like this: 12345-78-6. Number 1-6 represent your member number (they don’t change) but numbers 7&8 define your sub-accounts within your account. For example, your chequing account might be 12345-10-6 and your line of credit might be 12345-15-6.
- If you have a question about the switch process, please contact us at 506-452-1724 or at 1-800-565-5626.



Switch: Step 1

Switching your payments to NBTA Credit Union is easy. Check off your pre-authorized payments below once they are transferred to NBTA Credit Union.

Please note that it may take 2-4 weeks for your billing companies to process your request. When your checklist is complete, you can safely close your old account.

CHECKLIST

Pre-Authorized Payment	Account Number	Payment Amount	Contact Number	Date Called	Completed
Electricity		\$			<input type="checkbox"/>
Home Phone		\$			<input type="checkbox"/>
Cell Phone		\$			<input type="checkbox"/>
Internet		\$			<input type="checkbox"/>
Cable/Dish/Bundle		\$			<input type="checkbox"/>
Home Insurance		\$			<input type="checkbox"/>
Car Insurance		\$			<input type="checkbox"/>
Other Insurance		\$			<input type="checkbox"/>
Mortgage		\$			<input type="checkbox"/>
Natural Gas		\$			<input type="checkbox"/>
Heating Oil		\$			<input type="checkbox"/>
RRSP Contribution		\$			<input type="checkbox"/>
Savings/Investment		\$			<input type="checkbox"/>
Car Loan		\$			<input type="checkbox"/>
Other Loan		\$			<input type="checkbox"/>
Charity		\$			<input type="checkbox"/>
Credit Card		\$			<input type="checkbox"/>
Other		\$			<input type="checkbox"/>



Switch: Step 2

Complete one of these forms for each of your regular deposits or automatic payments. Mail your form to each of your billers. You may also use this form to move any direct deposits like your paycheque or pension plan.

PRINT AND COMPLETE THIS FORM FOR EACH REGULAR DEPOSIT AND AUTOMATIC PAYMENT

To whom it may concern,

Please note the following change to my account information:

Depositor/Biller:

Personal Information

Name

Name

Address

Address

City, Province, Postal Code

City, Province, Postal Code

Account Number (if applicable)

PLEASE REDIRECT MY:
 Regular Deposit(s)
 Automatic Payment(s)

My Account Information:
97114 849 | | | | | | | | | |
(TRANS) (IAS) YOUR ACCOUNT NUMBER

Effective:
 As Soon As Possible
 Beginning ___/___/___

SIGNATURE DATE

PHONE NUMBER

PLEASE NOTE THAT THIS FORM MAY NOT BE APPROPRIATE FOR ALL BILLERS.
PLEASE CONFIRM DETAILS REQUIRED FROM EACH OF YOUR BILLERS.