

REQUEST TO TRANSACT ACCOUNT/LOAN DATA CHANGES

ACCOUNT # _____ **MEMBER NAME** _____

"L" Type	Due Date Change		Payment Change		Payment Frequency		Transfer Account	
	From	To	From	To	From	To	From	To
	From	To	From	To	From	To	From	To
	From	To	From	To	From	To	From	To
	From	To	From	To	From	To	From	To
	From	To	From	To	From	To	From	To
	From	To	From	To	From	To	From	To

I/We authorize the transfer of the following loans and/or lines of credit from account number _____ to account number _____.

Primary Member Signature	Date	Joint Member Signature	Date

Representative Check List

- Yes No Is social security number reporting to the new account for payroll posting? If no, please explain. _____
- Yes No Is automatic Loan Transfer set? Transfer from new number _____ to old number _____
- Yes No Is Automatic Loan Transfer deleted from old account?
- Yes No Did you inform member that loan transfers can take up to 30 days?
- Attached is member account inquiry information on:
 Account Loan History Share History Collection Notes Copy of Credit Report Member Deferral Request
- Additional documentation (i.e., physician's note, termination/suspension, layoff letter, resignation, etc.) Other _____

Reason/Purpose of Data Change Request

- | | |
|--|--|
| <input type="checkbox"/> Retirement/Resignation/Termination/Leave of Absence/Suspension/
No longer receiving payroll.
<input type="checkbox"/> Member written request (see attached)
(Payment type change example: (P) Payroll to (C) Cash)
<input type="checkbox"/> Bankruptcy Petition received. | <input type="checkbox"/> Monetary debit transaction affected due date.
<input type="checkbox"/> Fraudulent activity, lost and stolen checks, ATM, etc.
(Member written request attached)
<input type="checkbox"/> Deferment-Reason _____
<input type="checkbox"/> Other: _____ |
|--|--|

Requested by _____ Date _____ Approved by _____ Date _____

Processed by _____ Date _____ Note: **Only a supervisor/manager/vice president can approve this request form.**

cc: Internal Audit