

Name/Nombre: _____ Account Number/Número de Cuenta: _____

Reason for closing the account/Razón por cual cierra la cuenta: _____

Address/Dirección: _____

Home Phone/Teléfono de Casa: _____ Work Phone/Teléfono de Trabajo: _____

Delivery of Funds/Entrega de fondos: (check one)

- ☐ Mail Check to Address on File
- ☐ Transfer to _____ (only Point West Accounts)
- ☐ Coming in Person

Signature/Firma: _____ Date/Fecha: _____

Credit Union Use Only

How Was the Form Received?

- ☐ In-Person: Valid ID Provided (Number and Expiration of ID): _____
- ☐ Phone Request: eDoc or DocuSign with Knowledge Base Access Authentication
- ☐ Mail/Email/Fax*: Matched signature to signature on file for member and callback completed

*Verification for Forms Received via Mail/Email/Fax:

Name of Member Confirming Request: _____ Phone Number Called: _____

Source of Phone Number: _____ Date & Time of Call: _____

ID Questions Asked: _____

Items Completed:

- ☐ ATM/Debit Card Closed
- ☐ Credit Card Closed in Service View
- ☐ All Shares Closed in Prodigy
- ☐ All Loans or Credit Cards Paid Off and Closed in Prodigy
- ☐ Bill Pay Deactivated
- ☐ Online Banking Disabled
- ☐ Email to ACH Department (if ACH Message Applies)
- ☐ Confirmed/Updated Phone Number & Address
- ☐ What steps were taken to keep membership?
- _____

Date Completed

Completed By (Name & Prodigy Teller #)