



MEMBERSHIP CLOSURE FORM

Member Name _____

Member # _____

Reason for Closing (Select One):

- | | |
|--|--|
| <input type="checkbox"/> Consolidating business elsewhere | <input type="checkbox"/> Deceased |
| <input type="checkbox"/> No longer using/Dormant | <input type="checkbox"/> Moving |
| <input type="checkbox"/> Loan Rates | <input type="checkbox"/> Deposit Rates |
| <input type="checkbox"/> Declined or Did not qualify for service | <input type="checkbox"/> Loan Paid off |
| <input type="checkbox"/> Service charges/Fees | |
| <input type="checkbox"/> Unhappy with Service – <i>Would you be willing to speak with a Supervisor/Manager about why you're closing the account?</i> | |
| <input type="checkbox"/> Needed Funds | |
| <input type="checkbox"/> Other _____ | |
| <input type="checkbox"/> Branch Convenience/Location | |

Additional Comments: _____

Signature _____

Date _____

PHH & myCUMortgage Comment – Ownership Share required to stay open

Credit Union Use Only

Verify ID & Address _____

Close Credit Cards (Enter Close Date & Capture Card) _____

Capture Debit Cards _____

Loans (Verify Loans are Paid & Closed) _____

Disable Online Banking _____

Loans (Just Paid off & has ACH) – Send ACH Cancel to Accounting _____

Disable Bill Pay _____

Cancel AD&D – Notify Member to call 877.636.2377 _____

Funds Disbursed _____

AD&D (Deceased Member) – Email Accounting _____

Input Closure Code _____

Member Rewards– Email IT & Branch Manager _____

Membership Closed _____

Completed By: _____

Date: _____

Teller Stamp