



Close Membership Worksheet

Member #: \_\_\_\_\_

\*\* Please provide current address to forward final statements and yearend tax documents \*\*

Names: \_\_\_\_\_

Current Address: \_\_\_\_\_

Account Numbers:

Share Savings: \_\_\_\_\_ Other: \_\_\_\_\_

Share Draft: \_\_\_\_\_ Other: \_\_\_\_\_

Credit Card: \_\_\_\_\_ Other: \_\_\_\_\_

Special Instructions: \_\_\_\_\_

Reason for closing membership: \_\_\_\_\_

Primary Members Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Joint Owner Signature: \_\_\_\_\_

\*\* There is a \$15 Reopen Fee for members who wish to reopen Membership in the future\*\*

FOR INTERNAL USE ONLY

- Change from Member to Non-Member
Click Enrollment in RM and "Inactivate"
Enrollment
Banking
Bill Payment
Click Personal in RM
Change Sign on ID Status to "FI-Disabled"
Add note in RM "Closed Membership"
Click Mobile in RM and "Deregister"
Charge \$5 Closing Fee (if applicable)
Close all accounts
Hotcard ATM/Debit cards (DO NOT DELETE)
Credit Cards- send e-mail to close
Delete all Agreements
Close Checking on Alloya
Message Account