

# REQUEST TO CLOSE ACCOUNT FORM



Dear valued Member:

Thank you for your Credit Union of Southern California (CU SoCal) Membership. Although you've elected to close your account, we hope you've enjoyed CU SoCal's many benefits.

**We'd appreciate it if you could please complete the brief survey below:**

	Excellent	Good	Average	Fair	Poor
Convenience of Hours	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Convenience of Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Friendliness/Professionalism	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Accuracy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Knowledgeable Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

**Please close the following share/loan ID number(s):**

Savings Account # \_\_\_\_\_ Checking Account # \_\_\_\_\_

Loan Account # \_\_\_\_\_ Other Account # \_\_\_\_\_

Visa® Account # \_\_\_\_\_

**Please check box if you would like to close your entire Membership.**

**NOTE:** In order to keep your Membership open, you are required to maintain a \$10 par balance in your share savings account.

**My reason(s) for closing my account(s)**—(Please check all that apply):

- Convenience—Hours, job change, moved
- Deceased
- Denied loan
- Dormant—Inactive, no longer need account(s), combined account(s)
- Paid off loan
- Pricing—better rate or fees
- Service
- Other

**Additional Comments:**

\_\_\_\_\_  
Member Name (please print)

\_\_\_\_\_  
Date

X

\_\_\_\_\_  
Signature