

Close Checking Only

Close Full Membership



Account Closing Form

Name		
Account #	Date	
	Yes	No
Were you satisfied with the service you received?	<input type="checkbox"/>	<input type="checkbox"/>
Were you satisfied with the products offered?	<input type="checkbox"/>	<input type="checkbox"/>
Comments/ Suggestions:		
If not satisfied, please explain:		
Signature X		

Reason for Closing	
Need Funds (51)	<input type="checkbox"/>
Moving (52)	<input type="checkbox"/>
Combining WCCU Accounts (53)	<input type="checkbox"/>
Master Member Passed Away (54)	<input type="checkbox"/>
Dormant (57)	<input type="checkbox"/>
Compromised (62)	<input type="checkbox"/>
Other—Provide reason (55)	<input type="checkbox"/>
Moving to another FI	<input type="checkbox"/>
No longer uses account	<input type="checkbox"/>
Paid off loan	<input type="checkbox"/>
Unable to remove J/O	<input type="checkbox"/>
Closed Business	<input type="checkbox"/>
	<input type="checkbox"/>

Office Use Only							
<u>Received by</u>	<u>Date</u>	<u>Tracker Entered By</u>	<u>55 Code Logged by</u>	<u>Plastics Closed in Gold by</u>	<u>VISA Closed by</u>	<u>Account Closed by</u>	
Compliance Department							
<u>Digital File to Closed by</u>		<u>Physical File Pulled by</u>		<u>Files Verified by</u>		<u>Email to Accounting</u>	
<u>Checklists/Check Orders Deleted by</u>							
<u>Plastics Closed in Desktop by</u>			<u>Compliance Log updated by</u>			<u>Verified by</u>	<u>Date</u>