

automatic share to share transfer form



Member Name: _____

Date: _____

from account number / include account suffix	to account number / include account suffix	amount

frequency of transfer

- option 1 / annually (1x / year)
- option 2 / semi-annually (2x / year)
- option 3 / quarterly (1x / quarter)
- option 4 / monthly (1x / month)
- option 5 / semi-monthly (2x / month)*
- option 6 / biweekly (every 2 weeks): if there are 3 scheduled transfers during a month, skip the first week
- option 7 / biweekly (every 2 weeks): if there are 3 scheduled transfers during a month, skip the last week
- option 8 / biweekly (every 2 weeks): continue biweekly, even if there are 3 scheduled transfers during a month
- option 9 / weekly (every week): continue weekly, even if there are 5 scheduled transfers during a month
- option 11 / biweekly (every week): if there are 5 scheduled transfers during a month, skip the first week
- option 12 / biweekly (every week): if there are 5 scheduled transfers during a month, skip the last week

transfer start date

specify date (month + day) for the 1st transfer: _____

*additionally, for semi-monthly frequency only,
specify date (month + day) for the 2nd transfer: _____

member signature: _____

for credit union use only

received by: _____	user #: _____
completed by: _____	date: _____