

# Switch Kit Worksheet

When you are ready, you can get started by coming into one of our convenient branches and talking to a Relationship Banker.

This Worksheet is designed to make it easy to gather information needed to make the move to our Bank. Use a copy of this Worksheet for each applicant on the account.



## Information Required for Applicant and Joint-Applicants

Please Print.

\_\_\_\_\_  
Full Name

\_\_\_\_\_  
Daytime Phone Number

\_\_\_\_\_  
Address 1

\_\_\_\_\_  
Evening Phone Number

\_\_\_\_\_  
Address 2

\_\_\_\_\_  
E-mail Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Employer Name

\_\_\_\_\_  
Bank Changing Account From

\_\_\_\_\_  
Employer Address 1

\_\_\_\_\_  
Old Account Number

\_\_\_\_\_  
Employer Address 2 (City, State, Zip Code)

Initial Deposit:	<input type="checkbox"/> CASH	<input type="checkbox"/> CHECK	<input type="checkbox"/> CREDIT CARD
------------------	-------------------------------	--------------------------------	--------------------------------------

Direct Deposits and Direct Payments are an easy way to save yourself a trip to the branch, gain quick access to your income, and make certain payments automatically.

Please indicate if you would like your Personal Banker to help you establish any of the following:

- |   |   |
|---|---|
| <input type="checkbox"/> Direct Deposits and/or Direct Payments | <input type="checkbox"/> FREE Online Banking and FREE Online Bill Pay |
| <input type="checkbox"/> Overdraft Protection Options           | <input type="checkbox"/> Ambassador Program                           |
| <input type="checkbox"/> ATM/Visa® Check Card                   | <input type="checkbox"/> Savings, Money Market and/or Health Savings  |
| <input type="checkbox"/> Visa® Credit Card                      | <input type="checkbox"/> Trust, Investment and Brokerage Services     |
| <input type="checkbox"/> Gift Cards                             | <input type="checkbox"/> Loans  |
| <input type="checkbox"/> Telephone Banking Line                 | <input type="checkbox"/> Insurance Products                           |

Step 1.	Complete the Switch Kit Worksheet by clicking the link and printing out the form. Then, when you are ready, you can get started by coming in to your local branch.
Step 2.	Stop using your old checking account. Identify all pending transactions and allow time for the transactions to clear before closing your account.
Step 3.	Transfer and/or set-up your Direct Deposits and Direct Payments by filling out the forms. You'll have to provide a completed copy of the forms to anyone who makes Direct Deposits or Direct Payments into or out of your old account.
Step 4.	Last, close your old account (leave enough money to cover all pending transactions).