



Crossroads Bank

Hassle Free Switch Kit



Switching financial institutions doesn't have to be difficult. We've helped a lot of customers make the switch and we can help you too.

Stop by or give us a call. Our friendly Customer Service Representatives will open your new account and help walk you through the three easy steps of switching to our bank.

Step 1: *Get started*

- Open your account at either of our branches (Banker Street or Keller Drive)
- If using online banking and bill-pay, sign up for these services and input all your biller's information into our system.

Step 2: *Move transactions to your new account*

- Destroy checks, ATM/debit cards and deposit slips from your old bank.
- Let outstanding checks and automatic withdrawals clear your account. Remember to leave enough money in your old account to cover them. This may take a few weeks.
- Tell your employer to change your direct deposit to Crossroads Bank (you can use our form and we will help you fill it in.)
- Contact anyone other than your employer who makes deposits into your account.
- Inform anyone that makes automatic withdrawals from your account that you have switched banks. (you can use our forms for this as well)
- Cancel automated payment services such as bill-pay
- Switch charges automatically billed to your old debit card to your new account by contacting the company that receives the payment

Step 3: *Close your old account*

- Ask your old financial institution to close your account and send you a check for the balance; make sure all outstanding items have cleared your account.

 **Crossroads Bank**
Switch Kit - Close Account

Date

Financial Institution's Name

Address

City, State, Zip

To Whom it May Concern:

Please close my **checking/savings** (circle one) account _____ (account number), and send a check for the remaining balance to me at the address listed below.

If you have any questions about this request, please contact me during the **day/evening** (circle one) at _____ (phone).

Thank you.

Sincerely,

Signature

Name (Please Print)

Co-Signor Signature

Co-Signor Name (Please Print)

Address

City, State, Zip

 **Crossroads Bank**
Switch Kit - Change Direct Deposit
(Please attach a voided check)

Date

Employer/Depositor's Name

Address

City, State, Zip

To Whom it May Concern:

You are currently depositing my paycheck to the following **checking/savings** (circle one) account:

Old Financial Institution

Bank Routing Number

Account Number

Please stop making deposits to that account and make the same deposits to **checking/savings** (circle one):

Crossroads Bank

New Financial Institution

081224122

Bank Routing Number

Account Number

If you have any questions about this request, please contact me during the **day/evening** (circle one) at _____ (phone).

Thank you.

Sincerely,

Signature

Name (Please Print)

Other Information Your Employer May Need (SSN)

Co-Signor Name (Please Print)

Address

City, State, Zip

 **Crossroads Bank**
Switch Kit - Change Withdrawal

Date

Name of company that makes automatic withdrawals

Company Address

City, State, Zip

To Whom it May Concern:

You are currently withdrawing _____ (amount) for my _____ (what payment is for) on _____ (date payment is withdrawn) from the following account:

Old Financial Institution

Bank Routing Number

Account Number

Please stop making withdrawals from that account and make them from:

Crossroads Bank

New Financial Institution

081224122

Bank Routing Number

Account Number

If you have any questions about this request, please contact me during the **day/evening** (circle one) at _____ (phone).

Thank you.

Sincerely,

Signature

Name (Please Print)

Address

City, State, Zip