

SWITCH KIT

Make the switch to better banking!

At Sullivan Bank, we want you to experience *A STEP UP IN SERVICE*, so we've made it even more convenient to switch your accounts. Just follow these simple instructions to get started.



Open a Sullivan Bank Account

Open your Sullivan Bank Account by visiting any of our locations



Direct Deposit

Set up your direct deposit into your new Sullivan Bank account.



Redirect Your Automatic Payments

This form should be sent to each company who has an automatic payment set up for you.



Close Old Account

Now you're ready to switch. Fill out the "Account Closure Authorization Form" to instruct your old bank to close your account.

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Direct Deposit Authorization Form

Use this form to authorize your employer, retirement and pension funds, or any other agency to deposit your payment directly into your Sullivan Bank account. Use one form for each direct deposit.

You can use your keyboard to fill out this form online, or you can print the form and complete it by hand.

Direct Deposit Authorization Notification

Company or Employer:

Company ID Number:
(if applicable)

Address:

City, State, Zip:

Phone Number:

Effective immediately, please deposit the net amount of my check to my Sullivan Bank account. I authorize (name of depositor) to automatically deposit funds into the accounts below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.

Place an X next to your desired option.

Net amount to Sullivan Bank CHECKING
Account # Routing # **081905302**

Net amount to Sullivan Bank SAVINGS
Account # Routing # **081905302**

Signature: **Date:**

Name:

Address:

City, State, Zip:

Phone Number:

Direct Deposit Checklist

Use this list to remember all your direct deposits you need to transfer. These are the most common direct deposits.

- Payroll
- Investments
- Retirement Plans
- Social Security

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Automatic Withdrawal Authorization

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal. Or, many companies and agencies make it easy to change your account on record online on their website.

You can use your keyboard to fill out this form online, or you can print the form and complete it by hand.

Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone Number:

Please discontinue my automatic withdrawal from the following current account:

Financial Institution:

Account # Routing #

Please update all future automatic withdrawals from the following account:

Financial Institution: **Sullivan Bank**

Account # Routing # **081905302**

This authorization will remain in effect until I have submitted a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature: Date:

Name:

Address:

City, State, Zip:

Phone Number:

Automatic Withdrawal Checklist

Use this list to remember all your automatic payments you need to transfer. These are some of the most commonly used automatic payments.

- Home Mortgage
- Auto Loans
- Utilities
- Insurance
- Cable/Internet
- Gym/Club Memberships
- Credit Cards
- Investments
- Subscriptions
- Charity Donations

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Account Closure Authorization

Use this form to close your account(s) by delivering it to your former financial institution. Be sure to verify any outstanding items have cleared your old account. You can authorize your remaining balance to be deposited automatically to your new Sullivan Bank account(s) or paid by a check forwarded to your mailing address.

You can use your keyboard to fill out this form online, or you can print the form and complete it by hand.

Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution:

Address:

City, State, Zip:

Please Close My Account:

Account Number:

Primary Owner:

Address:

City, State, Zip:

Please send the remaining balance to:

Place an X next to your desired option.

Please deposit directly to my new account at Sullivan Bank.

Account # _____ Routing # **081905302**

Please forward me a check to my address listed below.

Signature:

Date:

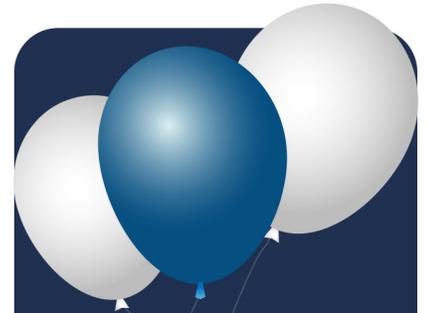
Joint Signature:

Name:

Address:

City, State, Zip:

Phone Number:



Congratulations!

You had to sign your name a few times, but submitting these forms completes your switch to **A Step Up In Service**. We can't wait to show you the difference a local partner makes.

*Welcome
to the
#SulliFam!*

