



# Switch Kit Guide

*Make the switch to Peoples State Bank in just four easy steps!*

## **1** *Open your Peoples State Bank account(s).*

Peoples State Bank Routing Number: **075908658**

List New Account numbers here for easy access: \_\_\_\_\_

## **2** *Change your direct deposits.*

Use the attached form to give to your employer or other payment source so your funds can be automatically deposited into your new account.

\*\*For Social Security Direct Deposits, we can assist you with calling the Social Security Administration at 1.800.772.1213 or signing up online at [www.ssa.gov/deposit/](http://www.ssa.gov/deposit/).

## **3** *Change your automatic payments.*

Use the attached form to help change your automatic payments that are set up with a company. If you have a login to a company's website or app, you will want to log into that to update your new payment information.

For automatic payments using your debit card, you will need to provide your new debit card number directly to the company. This form does not apply to updating debit card numbers.

## **4** *Close your old accounts.*

Use the attached form to notify your old financial institution about the accounts you are closing and give instruction for disbursement of any remaining funds in those accounts. You should have your old account numbers handy to complete this form. Make sure all checks have cleared and that anything else outstanding has posted. Once your account is closed, all transactions will be returned as account closed.

## STEP 2 – CHANGE DIRECT DEPOSITS

Complete this form and submit to any company or organization who is automatically depositing funds to your existing account, ie payroll.

To: Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

To Whom It May Concern:

I have recently changed my banking relationship to Peoples State Bank. Please route my direct deposit to my new account, as follows:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

New Bank Name: Peoples State Bank

New Bank Routing Number: 075908658

New Bank Account Number: \_\_\_\_\_

Account Type: Checking Savings Loan Payment

Effective beginning: \_\_\_\_\_

I hereby authorize to have my direct deposit switched to the account indicated above.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*Attach a voided check if required (not a deposit slip).*

## STEP 3 – CHANGE AUTOMATIC PAYMENTS

Complete this form and submit to any company or organization who is automatically withdrawing funds from your existing account.

To: Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Account/Policy: \_\_\_\_\_

To Whom It May Concern:

I have recently changed my banking relationship to Peoples State Bank. Please route my automatic payment to be debited from my new account, as follows:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

New Bank Name: Peoples State Bank

New Bank Routing Number: 075908658

New Bank Account Number: \_\_\_\_\_

Account Type: Checking Savings

Effective beginning: \_\_\_\_\_

I hereby authorize to have my automatic payment switched to the account indicated above.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Phone: \_\_\_\_\_

## STEP 4 – CLOSE OLD ACCOUNTS

Complete this form and submit it to your previous financial institution. Note: IRA (Individual Retirement Accounts) may require additional paperwork for tax purposes.

To: Financial Institution: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

This letter serves as authorization to close the following accounts with your institution:

Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

Account Number: \_\_\_\_\_ Account Type: \_\_\_\_\_

Send a check for the remaining balance, along with accrued interest, if applicable, to:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Phone: \_\_\_\_\_

# TRACK YOUR PROGRESS

Keep track of your progress to ensure you get all of your automated transactions switched over to your new account.

	Company	Phone	Contact Date	Effective Date
<b>Direct Deposits</b>				
<b>Automatic Payments</b>				

Reminders:

\*\* For payments that you have set up with a company that you log into their website or app, you will need to update the payment information directly on their website or app.

\*\* For payments that you have set up with a debit card, you will need to provide the new debit card number directly to the company by either calling them or logging into their website or app.

Other Notes: