

## How to Change Banks

Switching has never been easier.  
Or more convenient.

The way it **should** be.



## How to Change Accounts

Changing to Patriot Bank is easier than you might think. If you don't currently bank with us, these simple steps will help you close your current account and move your money into a Patriot Bank account.

### **Step One:**

#### **Open Your Patriot Bank Checking and Savings Accounts**

Complete the Customer Account Profile and return it to us. There will always be a friendly face at one of our locations to assist you with account opening. Temporary checks are available immediately and we'll order your first box of Patriot Bank checks FREE with Direct Deposit.

### **Step Two:**

#### **Move Your Money**

Calculate the amount of money needed to cover all outstanding checks, automatic payments, and service charges from your old checking account. Leave that total amount plus a small cushion in the account. Then write a check for the remainder and deposit it into your Patriot Bank checking account.

### **Step Three:**

#### **Paycheck Direct Deposit**

If your company offers Direct Deposit, complete the paycheck Direct Deposit authorization and return it to your payroll department. Your net pay will then be automatically deposited to your designated Patriot Bank account each payday morning. Instead of a paycheck, you'll receive a pay stub showing your earnings and deductions. To get cash, simply write a check or visit an ATM terminal.

### **Step Four:**

#### **Convert Your Automatic Payments**

If you have preauthorized payments from your old checking account, you'll need to notify the companies to begin taking the payments from your new Patriot Bank checking account. It could take a full billing cycle for some companies to adjust their records, so you may need to keep enough money in your old account to cover preauthorized payments. A voided check or deposit ticket from your Patriot Bank checking account contains the numbers necessary to make the change.

### **Step Five:**

#### **Convert Any Other Automatic Deposits**

If you have other automatic deposits, contact the issuer with your new Patriot Bank checking account information. A voided check or check deposit ticket from the new account contains the numbers necessary to make the change.

### **Step Six:**

#### **Close Your Old Account**

Once your automatic payments have been converted and all outstanding checks have cleared your old account, contact your former bank. To close your account, you can either write a final check from the account or ask the bank to send you a check for the remaining balance.

# Customer Account Profile

The following information will help make the transition to Patriot Bank fast and easy. Please complete the information requested and bring it with you when you come in to see us. All information is confidential and may be reviewed by you at any time.

Name \_\_\_\_\_ M.I. \_\_\_\_\_ Social Security # \_\_\_\_\_ Birth Date \_\_\_\_\_  
 Driver's License Number \_\_\_\_\_  
 Name \_\_\_\_\_ M.I. \_\_\_\_\_ Social Security # \_\_\_\_\_ Birth Date \_\_\_\_\_  
 Driver's License Number \_\_\_\_\_  
 Business Name \_\_\_\_\_ TIN# \_\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Home Phone \_\_\_\_\_ E-mail Address \_\_\_\_\_  
 Employer \_\_\_\_\_ Employer Phone \_\_\_\_\_  
 The financial institution you are moving from \_\_\_\_\_

**Products and services you currently have:**

- Checking Acct(s)
- Savings Acct(s)
- CDs/IRAs
- Overdraft Protection
- Visa®/MasterCard®
- ATM Card
- Visa Check Card
- Automatic Withdrawal
- Direct Deposit
- Consumer Loans
- Home Equity Loans
- Mortgage Loans
- Phone Banking
- Online Banking
- Business Account

**Products and services you are interested in with us:**

- Checking Acct(s)
- Savings Acct(s)
- CDs/IRAs
- Visa/MasterCard
- Business Account
- Direct Deposit
- Consumer Loans
- Home Equity Loans
- Mortgage Loans
- ATM/Debit Card
- Automatic Withdrawal
- Phone Banking
- Online Banking
- Brokerage Services
- Insurance Services
- Overdraft Protection
- Safe Deposit Box
- Other \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

**Do you have any of the following Automatic Withdrawals or Direct Deposit items? We would be happy to process these changes for you!**

Phone \_\_\_\_\_  
Company name Phone # Account #

Water \_\_\_\_\_  
Company name Phone # Account #

Electricity \_\_\_\_\_  
Company name Phone # Account #

Cable \_\_\_\_\_  
Company name Phone # Account #

Gas \_\_\_\_\_  
Company name Phone # Account #

Direct Deposit \_\_\_\_\_  
Company name Phone # Account #

Other \_\_\_\_\_  
Company name Phone # Account #

\_\_\_\_\_ Company name Phone # Account #

\_\_\_\_\_ Company name Phone # Account #

\_\_\_\_\_ Company name Phone # Account #

All the information I have given in this form is true and correct. I request that the paperwork necessary to open the account(s) indicated above be prepared. I understand that my signature(s) and opening deposit(s) will be required at a future date. By signing below I authorize you to check my credit and employment history and to answer any questions others may ask you about my credit record with you.

\_\_\_\_\_  
 Signature of Applicant Date

\_\_\_\_\_  
 Signature of Co-Applicant (if any) Date



Insurance and investment products are not deposits, not FDIC insured, not insured by any federal government agency, not guaranteed by the bank, and may go down in value.

