



[www.jerseystatebank.com](http://www.jerseystatebank.com)

## We make switching easy!

We want to make your move to Jersey State Bank as easy as possible. That's why we created this Switch Kit. Enclosed is everything you will need to close out your existing accounts and transfer your automatic deposits and withdrawals to your new account with Jersey State Bank!

### 1. Thank you for your business.

Now that your new account is open and you have received your new checks, stop using your old account. Use this time to destroy any unused checks, ATM and debit cards, and deposit slips.

### 2. Change your direct deposits.

Direct Deposit simplifies everything! Use the attached form to give to your employer or other payment source so your funds can be automatically deposited into your new account. (Examples: payroll, pension, investments, etc.)

#### Direct Deposit is:

- **Simple:** With direct deposit, your check is automatically deposited into your account and available sooner than regular check deposits
- **Safe:** Direct Deposit is safer than a traditional paper check. You don't have to worry about your check being lost on the way to the bank or risk someone else accessing your financial information. The funds are sent directly to the bank, so only you have access to your information.
- **Convenient:** You never have to worry about when you can get to the bank to deposit your check. Direct deposit saves you the time and hassle of having to come to the bank to make your deposit.

### 3. Change your automatic payments.

Use the enclosed forms to change all automatic withdrawals or automated payment services. Don't forget about those that use your old debit card number, such as automatic payments online. (Examples: Netflix, Dish Network, PayPal, etc.)

#### Automatic payment is:

- **Safe:** With automatic payments, you will never have to worry about your checks being lost in the mail or ending up in the wrong hands
- **Inexpensive:** Automatic payment is free! You save money on the cost of stamps, envelopes, checks, and time!
- **Convenient:** Automatic payment saves you the time of running to the post office and manually writing out checks to pay your bills.

### 4. Close your old accounts.

We can help you fill in the blanks on this form and all you have to do is sign it. This form will notify your old financial institution about the accounts you are closing and gives directions for disbursement of any remaining funds in those accounts. You will need to know your old account numbers in order to close these accounts. Make sure all checks have cleared and all debits have switched over.

# Change Direct Deposit

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Complete and submit this form along with a voided check from your new account, to any company or organization who is automatically depositing funds into your existing checking account

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

Address \_\_\_\_\_

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

**To Whom It May Concern:**

**I've recently changed my banking relationship to Jersey State Bank. Please redirect my direct deposit into my new account, as follows:**

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

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

New Bank Name: **Jersey State Bank** \_\_\_\_\_

New Bank Routing Number: **081904468** \_\_\_\_\_

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

Account Type:  Checking  Savings  Loan Payment \_\_\_\_\_

**I hereby authorize to have my direct deposit switched to my account with Jersey State Bank.**

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

# Change Automatic Payments

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

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

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

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

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

My current payment amount is: \$ \_\_\_\_\_

## To Whom It May Concern:

**Effective \_\_\_/\_\_\_/\_\_\_, I hereby authorize to change my automatic payments to the company listed below to be withdrawn from my account at Jersey State Bank.**

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

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

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

## Please redirect my automatic payment to come from my new account:

New Bank Routing Number: **081904468** \_\_\_\_\_

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

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

# Close Out Accounts

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Complete this form and submit it to your previous financial institution. Make sure all checks have cleared.

Note: IRA (Individual Retirement Accounts) require additional paperwork for tax purposes.

**TO:**

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

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

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

**From:**

Primary Account Holder: \_\_\_\_\_

Secondary Account Holder: \_\_\_\_\_

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

Account # \_\_\_\_\_ Account Type \_\_\_\_\_

Account # \_\_\_\_\_ Account Type \_\_\_\_\_

Account # \_\_\_\_\_ Account Type \_\_\_\_\_

**Send a check for the remaining balance, together with all accrued interest, to:**

**Jersey State Bank** F/B/O \_\_\_\_\_

Attention: \_\_\_\_\_

1000 South State Street

Bank Routing Number:

081904468

Account # \_\_\_\_\_

Account Holder Signature: \_\_\_\_\_

