



YOU WORK HARD FOR YOUR MONEY. YOU SHOULDN'T HAVE TO WORK HARD TO MOVE IT. Switching banks doesn't have to be a hassle. We can help make sure your switch to Pinnacle Bank is as easy as possible.

1) ESTABLISH A NEW ACCOUNT WITH PINNACLE BANK

Visit your local Pinnacle Bank or apply online at pinnbanktx.com.

2) MOVE YOUR AUTOMATIC PAYMENTS AND DEPOSITS TO YOUR NEW ACCOUNT

We've provided the forms you'll need. Just fill in the blanks and sign. Or, bring us a list of your payees and companies that credit your account, and we'll take care of the change for you.

3) CLOSE YOUR OLD ACCOUNT

We've provided a letter that notifies your old bank about the accounts you are closing and gives directions for disbursement of any remaining funds. Just make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.

4) QUICK CHECKLIST

To help you keep track of your switch, we've included a quick checklist. You can use this form to track all of the information you need to move your direct deposits, payments, and close your old account. Or, one of our bankers can take care of the switch for you and keep you informed of the progress.

Be sure to shred or destroy any unused checks, deposit slips and ATM or check cards. Don't forget about other items such as your savings account, safe deposit box, loans or lines of credit and credit cards. We can help move these accounts as well.



AUTHORIZATION FOR DIRECT DEPOSIT

TO: _____

(Employer)

PLEASE SWITCH MY DIRECT DEPOSIT TO

PINNACLE BANK STARTING:

DATE: ____ / ____ / _____

NEW ACCOUNT #: _____

(Attached is voided check)

NEW BANK ROUTING #: _____ 111903517

SWITCHING FROM: _____

(Name of Previous Financial Institution)

OLD ACCOUNT #: _____

OLD BANK ROUTING #: _____

ACCOUNT HOLDER: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (____) ____ - _____

SIGNATURE: _____

PRINTED NAME: _____



AUTHORIZATION FOR AUTOMATIC PAYMENT

SERVICE PROVIDER: _____

MY ACCOUNT # WITH
YOUR ORGANIZATION: _____

PLEASE SWITCH MY AUTOMATIC PAYMENT TO PINNACLE BANK STARTING:

DATE: ____ / ____ / _____

TYPE OF ACCOUNT: _____
(Checking or Savings)

NEW ACCOUNT #: _____

(Attached is Voided Check)

NEW BANK ROUTING #: _____ 111903517 _____

SWITCHING FROM: _____

(Name of Previous Financial Institution)

OLD ACCOUNT #: _____

OLD BANK ROUTING #: _____

ACCOUNT HOLDER: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (____) ____ - _____

SIGNATURE: _____

PRINTED NAME: _____



ACCOUNT CLOSING REQUEST

DATE: ____ / ____ / _____

TO: _____

(Financial Institution Name)

ADDRESS: _____

CITY, STATE, ZIP: _____

FROM: _____

(Name(s) on Account)

LAST 4 DIGITS OF SOCIAL SECURITY #: _____

PLEASE **CLOSE** THE FOLLOWING
ACCOUNTS WITH YOUR INSTITUTION:

ACCOUNT #1	ACCOUNT TYPE	
	ACCOUNT	
	SEND PAYMENT AT ONCE <input type="checkbox"/> (CHECK ONE)	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/> (CHECK ONE)
ACCOUNT #2	ACCOUNT TYPE	
	ACCOUNT	
	SEND PAYMENT AT ONCE <input type="checkbox"/> (CHECK ONE)	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/> (CHECK ONE)
ACCOUNT #3	ACCOUNT TYPE	
	ACCOUNT	
	SEND PAYMENT AT ONCE <input type="checkbox"/> (CHECK ONE)	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/> (CHECK ONE)

Forward funds to me at the following address:

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (____) ____ - _____

SIGNATURE: _____

JOINT ACCOUNT

HOLDER SIGNATURE: _____

PRINTED NAME: _____



SWITCH CHECKLIST

WE MAKE IT EASY TO SWITCH TO PINNACLE BANK. JUST FOLLOW OUR SIMPLE CHECKLIST TO MAKE YOUR MOVE AS SMOOTH AS POSSIBLE.

- Open your new account(s) at Pinnacle Bank.

- Fill out the enclosed Direct Deposit, Automatic Deposit and Automatic Payment forms.

- Make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.

- Close your account by notifying your old bank with the enclosed form.

- Destroy all unused checks, deposit slips, ATM and check cards. Keep your new Pinnacle Bank routing and account numbers handy for direct deposit and automatic withdrawal requests.



THE WAY BANKING SHOULD BE



MEMBER FDIC



TRACK YOUR SWITCH

You can use this form to keep track of all the information you need to move your direct deposits, payments and close your old account.

**YOUR PINNACLE BANK
ACCOUNT #** _____

**YOUR PINNACLE BANK
ROUTING #** 111903517

DIRECT DEPOSIT

ONE	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	
TWO	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	
THREE	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	

AUTOMATED PAYMENTS

ONE	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	
TWO	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	
THREE	COMPANY (Name/Address)		
	DATE LETTER MAILED	/ /	STATUS
	ESTIMATED SWITCHING DATE	/ /	



TRACK YOUR SWITCH

OUTSTANDING CHECKS

ONE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #	
	OUTSTANDING CHECK AMOUNT	
	DATE CLEARED	
TWO	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #	
	OUTSTANDING CHECK AMOUNT	
	DATE CLEARED	
THREE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #	
	OUTSTANDING CHECK AMOUNT	
	DATE CLEARED	
FOUR	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #	
	OUTSTANDING CHECK AMOUNT	
	DATE CLEARED	
FIVE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #	
	OUTSTANDING CHECK AMOUNT	
	DATE CLEARED	

(Make sure all your outstanding checks have cleared.)



Pinnacle Bank

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REV. 04/14