



**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](http://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.



DATE \_\_\_\_\_

TO (Company) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

## RE: INSTRUCTIONS FOR CHANGING DIRECT DEPOSIT

Dear Employer,

I have recently changed banks and will need to have my payroll direct deposit switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME \_\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_

I currently have my direct deposit going to:

FINANCIAL INSTITUTION \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # \_\_\_\_\_

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # 111903517

If for any reason you may need additional information, please call me at: \_\_\_\_\_.

Thank You.

Sincerely,

SIGNATURE \_\_\_\_\_

PRINT NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

ENCLOSED: Voided check from my new Pinnacle Bank account.



DATE \_\_\_\_\_

TO (Company) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

## RE: INSTRUCTIONS FOR CHANGING AUTOMATIC DEPOSITS

Dear Sir or Madam,

I have recently changed banks and will need to have my automatic deposit switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME \_\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_

MY ACCOUNT # WITH YOUR ORGANIZATION \_\_\_\_\_

DEPOSIT AMOUNT (if applicable) \_\_\_\_\_

I currently have my automatic deposit going to:

FINANCIAL INSTITUTION \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # \_\_\_\_\_

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # 111903517 \_\_\_\_\_

If for any reason you may need additional information, please call me at: \_\_\_\_\_ .

Thank You.

Sincerely,

SIGNATURE \_\_\_\_\_

PRINT NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

ENCLOSED: Voided check from my new Pinnacle Bank account.



DATE \_\_\_\_\_

TO (Company) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

## RE: INSTRUCTIONS FOR CHANGING AUTOMATIC PAYMENTS

Dear Sir or Madam,

I have recently changed banks and will need to have my automatic payments switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME \_\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_

MY ACCOUNT # WITH YOUR ORGANIZATION \_\_\_\_\_

DEPOSIT AMOUNT (if applicable) \_\_\_\_\_

I currently have my automatic payments coming from:

FINANCIAL INSTITUTION \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # \_\_\_\_\_

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) \_\_\_\_\_

ACCOUNT # \_\_\_\_\_

BANKING ROUTING # 111903517 \_\_\_\_\_

If for any reason you may need additional information, please call me at: \_\_\_\_\_ .

Thank You.

Sincerely,

SIGNATURE \_\_\_\_\_

PRINT NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

ENCLOSED: Voided check from my new Pinnacle Bank account.



# SWITCHKIT | ACCOUNT CLOSING REQUEST

DATE \_\_\_\_\_

TO (Financial Institution Name) \_\_\_\_\_

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

FROM (Name(s) on Account) \_\_\_\_\_

SOCIAL SECURITY # \_\_\_\_\_

PLEASE CLOSE THE FOLLOWING ACCOUNTS WITH YOUR INSTITUTION:

ACCOUNT TYPE	ACCOUNT #	SEND PAYMENT AT ONCE	DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT

**FORWARD FUNDS TO ME AT THE FOLLOWING ADDRESS:**

Together with all the interest or dividends that may have become due on above listed accounts

ADDRESS \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_

If for any reason you may need additional information, please call me at: \_\_\_\_\_ .

Thank You.

Sincerely,

SIGNATURE \_\_\_\_\_

JOINT ACCOUNT HOLDER SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_



YOUR PINNACLE BANK ACCOUNT # \_\_\_\_\_

YOUR PINNACLE BANK ROUTING # 111903517

## DIRECT DEPOSITS

COMPANY (Name/Address)	DATE LETTER MAILED	ESTIMATED SWITCHING DATE (Assume 2 months)	STATUS

## AUTOMATIC PAYMENTS

COMPANY (Name/Address)	DATE LETTER MAILED	ESTIMATED SWITCHING DATE (Assume 2 months)	STATUS

## CLOSE OLD ACCOUNT *(Make sure all your outstanding checks have cleared.)*

OUTSTANDING CHECK PAYABLE TO:	OUTSTANDING CHECK #	OUTSTANDING CHECK AMOUNT	DATE CLEARED



THE WAY BANKING SHOULD BE