



# Switch Kit



Switching Banks is easier  
than you think.

*Your bank, just around the corner!*



## Follow These Easy Steps

Joining us is easy... At Cornerstone Bank, our devoted staff is eager to go above and beyond to maintain a trustworthy and straightforward relationship with our customers. Now switching all of your accounts to Cornerstone Bank has never been easier. This switch kit includes all of the information you need to switch your accounts to our bank.

- **COMPLETE THE FORMS**
- **NOTIFY ALL COMPANIES**
- **DELIVER TO CORNERSTONE BANK**
- **SIGN & SWITCH today!**

The form takes just minutes to complete and includes everything required to notify your direct deposit source (Employer, Social Security, Disability etc.) that you have switched your accounts to Cornerstone Bank.

Just complete the forms, make copies for everyone you need to notify, and then mail them out. It's that easy! And if you need further help or have any questions, just give us a call or stop in to see us and we'll walk you through it. We promise that you've never seen local banking like this before. At Cornerstone Bank, we are dedicated to serving our community because we live and work here – just like you.



## Closing Your Old Account

Before you close your old account, make sure to leave enough money to cover any outstanding checks, automatic withdrawals and debit transactions.

Once all of these outstanding charges have been paid, ask your previous bank or credit union to send your remaining balance(s) directly to your new account with us. Then, destroy all of your old checks, ATM cards, debit cards and deposit slips.

To make switching even easier for you, here's your new Cornerstone Bank **Account Number** and **Routing Number**:

**Cornerstone Bank**  
**Routing #:** \_\_\_\_\_

**Cornerstone Bank**  
**Account #:** \_\_\_\_\_

You can find your previous routing and account number at the bottom of one of your old checks. Bank routing numbers are the first nine digits for the series, followed by the account number and individual check numbers.

## Step 1:

### Authorization to Change Direct Deposit

Send this form to your employer.

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

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

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

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

### Attention Direct Deposit Department:

Please direct all future payroll direct deposits to the following accounts:

**Cornerstone Bank Routing #:** \_\_\_\_\_

**Net paycheck to** (choose one):

**Checking Account #:** \_\_\_\_\_

**Savings Account #:** \_\_\_\_\_

**Start Date** (mo/day/year): \_\_\_\_\_

If you have any additional questions, please contact me:

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

Social Security or Employee ID: \_\_\_\_\_

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

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

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

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

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

E-mail: \_\_\_\_\_

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

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

## Step 2:

### Notice of Automatic Withdrawal Change

Send this form to all companies with whom you have automatic withdrawals. Complete this section for all companies as needed.

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

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

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

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

### To Whom It May Concern:

I have recently changed my primary financial institution to **Cornerstone Bank**.

You are currently withdrawing \$ \_\_\_\_\_

from my checking/savings (circle) account # \_\_\_\_\_

from my current financial institution

(name) \_\_\_\_\_

with routing # \_\_\_\_\_

The payment is for billing account # \_\_\_\_\_

and is withdrawn on (date) \_\_\_\_\_

Please begin withdrawing this payment from my account with **Cornerstone Bank**.

Routing # \_\_\_\_\_

New Checking/Savings (circle) Account # \_\_\_\_\_

**This change is effective immediately.**

If you have any additional questions, please contact me:

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

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

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

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

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

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

E-mail: \_\_\_\_\_

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

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

## Step 3:

### Authorization to Close Account

Send this form to the financial institution where you will be closing your account.

### To Whom It May Concern:

My Current Financial Institution Name: \_\_\_\_\_

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

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

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

Effective (mo/day/year): \_\_\_\_\_

### Please close my account:

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

Primary Owner: \_\_\_\_\_

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

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

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

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

Please send the remaining balance to (check one):

\_\_\_\_ **My New Cornerstone Bank Account**

Routing #: \_\_\_\_\_

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

\_\_\_\_ **My Address Listed Above**

Signature (Primary Owner): \_\_\_\_\_

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

Signature (Joint Owner): \_\_\_\_\_

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



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