



## The Switch Kit

Switching to New Era Bank is a simple process with our Express Switch Kit. We will walk you through step-by-step what you need to do to get started.

### STEP 1

Open your New Era Bank checking account.

With all the checking accounts we offer, one will certainly fit your needs. Visit one of our locations today and open an account.

### STEP 2

Stop using your previous account.

As soon as possible, you should stop writing checks, using your ATM card or debit card, or making payments from your old checking account. Close your former account by completing an [Account Closing Request](#) or contact your former bank directly.

### STEP 3

Switch your direct deposit.

Make a list of your current automatic deposits and payments with our [Activity Tracking Sheet](#). Use our [Direct Deposit Request Form](#) and our [Automatic Payment Transfer Form](#) to transfer any payments you have with your old account.

If you do not currently use Direct Deposit, rest easy and save yourself a trip to the bank by having your paycheck, pension, Social Security benefit, or even interest and dividend payments directly deposited into your checking account. Any check deposited through Direct Deposit is cleared and available to you at the start of the business payday.

To set up direct deposit, you will need:

A completed Direct Deposit Request Form

Your new New Era Bank account number.

Your old account number from your previous checking account.



**ACCOUNT CLOSING REQUEST**

Peace of Mind... When You Bank With Us

To close an account, complete and mail this form to your former financial institution.

**TO:**

**FROM:**

\_\_\_\_\_  
Former Financial Institution Name

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

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

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

**To Whom It May Concern: Please close my account, effective today's date, and send a check for the remaining balance to my address above.**

I understand that all checks, automatic debits and other transactions need to have cleared before completely closing my account(s). I have made arrangements to switch my automatic debits and automatic deposits.

\_\_\_\_\_  
Former Financial Institution Name

\_\_\_\_\_  
Your Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address

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

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

**If you have any questions about this request, please call me at:**

\_\_\_\_\_  
Phone Number Day / Evening (circle one)

**Sincerely,**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Joint Account Holder Signature

\_\_\_\_\_  
Name (Print)

\_\_\_\_\_  
Joint Account Holder Name (Print)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date



**ACTIVITY TRACKING SHEET**

**Direct Deposits**

(List names of specific sources under each category)

Employer(s) Payroll: \_\_\_\_\_

\_\_\_\_\_

Pensions(s)/Retirement Plans: \_\_\_\_\_

\_\_\_\_\_

Social Security: \_\_\_\_\_

Investment Income: \_\_\_\_\_

Amount

Date

\_\_\_\_\_

\_\_\_\_\_

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**Automatic Payments**

(List name of specific biller next to each category)

Mortgage: \_\_\_\_\_

\_\_\_\_\_

Auto Loans: \_\_\_\_\_

\_\_\_\_\_

Insurance: \_\_\_\_\_

\_\_\_\_\_

Credit Cards: \_\_\_\_\_

\_\_\_\_\_

Gas/Electric: \_\_\_\_\_

\_\_\_\_\_

Television: \_\_\_\_\_

Telephone: \_\_\_\_\_

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

Internet Provider: \_\_\_\_\_

Investments: \_\_\_\_\_

IRA/Retirement: \_\_\_\_\_

Charities: \_\_\_\_\_

Other: \_\_\_\_\_

Amount

Date

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# DIRECT DEPOSIT & AUTOMATIC PAYMENTS

## For Direct Deposit and Automatic Payments

To change or set up Direct Deposits or Automatic Payments, complete this form and send it to your employer or creditor.

**TO:**

**FROM:**

Business Name

Your Name

Address

Address

City State Zip

City State Zip

**To Whom It May Concern: Please redirect my direct deposit/automatic payment for the above account number to my New Era Bank account as instructed below.**

**Please change my:**

**Account Type:**

Direct Deposit  Automatic Payment

Checking  Savings

**Effective:**

**Amount:**

Immediately  Beginning \_\_\_/\_\_\_/\_\_\_

\$\_\_\_\_\_ or \_\_\_\_\_%

**My New Era Bank account information**

Your New Era Bank Account Number

081502637  
New Era Bank Routing Number

**If you have any questions about this request, please call me at:**

\_\_\_\_\_  
Phone Number Day / Evening (circle one)

**Sincerely,**

Signature

Joint Account Holder Signature

Name (Print)

Joint Account Holder Name (Print)

Date

Date