

SwitchKit



**You work hard for your money.
You shouldn't have to work hard to move it.**

Switching banks shouldn't be a hassle. That's why we designed our SwitchKit to help make your switch to Pinnacle Bank as easy and convenient as possible.

Along with the enclosed step-by-step Switch Checklist, we've included valuable forms to help you:

- ◆ Switch your automatic deposits
- ◆ Move your automatic payments
- ◆ Close your old account

We want you to have the resources you need to feel confident in your switch to Pinnacle Bank. If you would like further assistance, we are happy to help.

If you need help switching your savings account, safe deposit box, loans or lines of credit, we can help move these accounts as well.



THE WAY BANKING SHOULD BE



MEMBER FDIC

SwitchKit Checklist

Use this checklist to track your progress as you switch automatic deposits and payments to your new checking account. Contact us if you need help switching other accounts or services.

Keep your old accounts open until all outstanding checks clear and automatic transactions are updated with your new account details. Once updates are complete, submit the Account Closing Request form to close your accounts at your former bank.

New Account Information:

Routing Number: **107002448**

Checking: _____ Checks Received Debit Card Received

Savings: _____

Update Automatic Deposits:

Payroll Other: _____

Update Automatic Payments:

- | | | |
|-------------------------------------------|------------------------------------------------|--------------------------------------------|
| <input type="checkbox"/> Electric | <input type="checkbox"/> Gas | <input type="checkbox"/> Water |
| <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Homeowner's Insurance | <input type="checkbox"/> Auto Insurance |
| <input type="checkbox"/> Life Insurance | <input type="checkbox"/> Mortgage | <input type="checkbox"/> Auto Loan |
| <input type="checkbox"/> Student Loan | <input type="checkbox"/> Credit Card | <input type="checkbox"/> Other Loan(s) |
| <input type="checkbox"/> Phone | <input type="checkbox"/> Internet | <input type="checkbox"/> Cable/TV Provider |
| <input type="checkbox"/> Trash | <input type="checkbox"/> Security System | <input type="checkbox"/> Subscriptions |
| <input type="checkbox"/> Association Dues | <input type="checkbox"/> Donations | <input type="checkbox"/> Memberships |

Other: _____

Prepare to Close Old Accounts:

- Confirm outstanding checks have cleared
- Confirm account number has been updated for automatic deposits and payments
- Submit the Account Closing Request form to former bank
- Destroy old debit card(s), unused checks and deposit slips

Locate the Pinnacle Bank branch or ATM nearest you by visiting us online at nmpinnbank.com/locations.

FOR ASSISTANCE AFTER SETTING UP YOUR ACCOUNT, CALL YOUR LOCAL BRANCH OR OUR CUSTOMER SUPPORT CENTER: 1.800.227.7715



THE WAY BANKING SHOULD BE



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Authorization for Direct Deposit

Complete this form and submit it, along with a voided check, to your employer and anyone depositing electronically into your account. If submitting via email, request secure transmission instructions.

If your deposit is issued by the U.S. Treasury (i.e. Social Security, Dept. of Veterans Affairs, etc.), contact the federal agency that pays your benefits for instructions to update account information: <https://godirect.gov/gpw/paying-agencies/>

TO: _____

(Employer/Depositor Name)

Please switch my Direct Deposit to **Pinnacle Bank** starting:

DATE: ____ / ____ / _____

ACCOUNT #: _____

BANK ROUTING #: **107002448** _____

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

PHONE: (____) ____ - _____

Authorization for Automatic Payments

Complete this form and send to any company or organization that you have set up automatic payments with. If submitting via email, request secure transmission instructions.

SERVICE PROVIDER: _____

MY ACCOUNT # WITH
YOUR ORGANIZATION: _____

ACCOUNT HOLDER: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (_____) _____ - _____

PLEASE SWITCH MY AUTOMATIC PAYMENT ACCOUNT INFORMATION TO
PINNACLE BANK STARTING ON:

DATE: ____ / ____ / _____

TYPE OF ACCOUNT: CHECKING SAVINGS

ACCOUNT #: _____

BANK ROUTING #: **107002448** _____

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

If a different form is required to change my account for automatic payments, please send your authorized form.

Account Closing Request

DATE: ____ / ____ / _____

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

TO: _____
(Financial Institution Name)

ADDRESS: _____

CITY, STATE, ZIP: _____

FROM: _____
(Name(s) on Account)

ID INFORMATION #: _____

ACCOUNT#: _____ ACCOUNT TYPE: CHECKING SAVINGS

ACCOUNT#: _____ ACCOUNT TYPE: CHECKING SAVINGS

ACCOUNT#: _____ ACCOUNT TYPE: CHECKING SAVINGS

ACCOUNT#: _____ ACCOUNT TYPE: CHECKING SAVINGS

Send payment at once Send payment after next interest posts

FORWARD FUNDS TO ME AT THE FOLLOWING ADDRESS:

ADDRESS: _____

CITY, STATE, ZIP: _____

PHONE: (_____) _____ - _____

SIGNATURE: _____

PRINTED NAME: _____