

# SWITCH KIT



RESOLUTE  
BANK®

*Solutions With You In Mind*

# WELCOME PACKAGE



# SWITCH KIT

## MOVING YOUR PERSONAL MONEY IS EASY!

Thank you for choosing **Resolute Bank** for your personal banking solutions. There is a lot to think about when moving your accounts—so to make it easier we've done the thinking for you! We are happy to sit down with you and help make the process as easy as possible, right down to mailing these forms for you.

### THE TRANSFER IS A SNAP WITH THESE EASY STEPS...

#### Open Your New Account With Us

Start by filling out our **New Account Information Form**. Then begin phasing out your existing account(s). Just leave enough funds for all your remaining checks/payments to clear. Shred your unused checks, ATM/debit cards, and deposit slips.

#### Direct Deposit Form

Redirect your existing direct deposits or initiate a direct deposit to your new account. Send the form(s) to all depositors and include your new deposit slip or a voided check with your form.

#### Automatic Withdrawal Form

Redirect your automatic withdrawals to your new account. Send the form(s) to all companies that you wish to change/add an automatic withdrawal. Remember those that use your old debit card number. We've also added an automatic withdrawal checklist to help you stay organized, for those that can be changed online or in person.

#### Personal Online/Mobile Banking and Bill Pay Sign-Up Form

View all your accounts, reconcile, transfer, pay bills, and more anytime, anywhere with our convenient Online/Mobile Banking and Bill Pay. Go to our website and sign up today!

#### Closed Account Request Form

Once all outstanding items have cleared your old account and you have moved your direct deposits and automatic withdrawals, complete the Closed Account Request Form and send it to your old bank. They will mail you a check for your remaining balance. Check out the included Transfer Tips for general guidelines on the time it takes to transfer payments and deposits.

**It's that easy! We want your business and we'll work hard to earn it!**

Relationships are what set us apart from other banks. If you need any assistance, please give us a call or stop in.



# SWITCH KIT

## NEW PERSONAL ACCOUNT INFORMATION FORM

### PRIMARY ACCOUNT HOLDER INFORMATION

Name:

Street Address:

City, State, Zip:

Mailing Address  
(if different):

City, State, Zip:

Home Phone:

Work Phone:

E-mail Address:

Social Security  
Number:

Driver's License:

Date of Birth:

Mother's  
Maiden Name:

Employer:

Position/  
Occupation:

### JOINT ACCOUNT HOLDER INFORMATION

Name:

Street Address:

City, State, Zip:

Mailing Address  
(if different):

City, State, Zip:

Home Phone:

Work Phone:

E-mail Address:

Social Security  
Number:

Driver's License:

Date of Birth:

Mother's  
Maiden Name:

Employer:

Position/  
Occupation:

### I WOULD LIKE TO OPEN\*:

Personal Checking    Personal Money Market    Personal Savings    CD    IRA    Health Savings Account

Would you like checks ordered?    Yes    No

I/we would like an ATM/Debit Card - # of cards:

I/we would like free online and mobile access to our personal account(s).

I/we would like to apply for:    Overdraft Protection\*    Home Equity Line of Credit\*    Auto/Boat Loan\*    Mortgage Loan\*  
Personal Line of Credit\*    Home Equity Loan\*    Personal Credit Card\*    1st Time Homebuyer/VA\*

\*This document represents your request to open an account with Resolute Bank. All documents and information provided are subject to verification and approval. Accounts are not opened until information is verified and all account documentation is signed. Loan requests are subject to application and credit approval.

Primary Account Holder's Signature:

Date:

Joint Account Holder's Signature:

Date:



# SWITCH KIT

## DIRECT DEPOSIT FORM

Use your employer's Online Human Resources Center and change your direct deposit information using the new information listed below. If you do not have Online access, mail this form to all of your current direct deposit contacts and redirect your deposits. If you do not currently have direct deposit, start today by filling out the information below, including your new account number, and mail it to your direct deposit contacts. Include a new deposit slip or a voided check with your form.

**Social Security | Payroll & Commissions | Retirement Plan Dividends | Child Support**

**Date:**

**Depositor's Name:**

**Address:**

**City, State, Zip:**

### TO WHOM IT MAY CONCERN:

This letter serves as a request to have my direct deposit transferred into my Resolute Bank account.

**New Bank:**

RESOLUTE BANK

**Account Number:**

**Routing Number:**

041215812

If you have any questions, please don't hesitate to call me at

. Thank you.

Sincerely,

**Signature:**

**Address:**

**Print Name:**

**City, State, Zip:**

\*Other information may be needed (SSN, ID#, etc.)



# SWITCH KIT

## PERSONAL ACCOUNT AUTOMATIC WITHDRAWAL

Use this form to notify companies that you currently have automatic withdrawals set up with. Don't forget those that use your old debit card number and automatic payments made Online. You may also use this form to set up new withdrawals. Note: You may also visit the companies' websites to make these changes Online.

### Utilities | Internet Service Providers | Loans | Account Transfers

Date:

Payee Name:

Address:

City, State, Zip:

### TO WHOM IT MAY CONCERN:

This letter serves as a request to have my automatic withdrawal transferred to my new account.

### Currently withdrawn from my account with:

Current Bank:

Account Number:

Date Withdrawn:

Routing Number:

Please redirect my withdrawal to my new account with:

Please set up a new withdrawal from my account with:

New Bank: RESOLUTE BANK

Account Number:

Routing Number: 041215812

If you have any questions, please don't hesitate to call me at  
Sincerely,

. Thank you.

Signature:

Address:

Print Name:

City, State, Zip:

\*Other information may be needed (SSN, ID#, etc.)



# SWITCH KIT

## AUTOMATIC WITHDRAWAL CHECKLIST

Use this checklist to organize the automatic withdrawal/payment authorizations that must be updated when switching banks.

Type	✓	Withdrawal Type	Company	Account #	Contact Information
Auto Insurance					
Auto Loan					
Cable/Satellite/Internet					
Charities/Tithe					
Child Care					
Credit Card Payment					
Electric					
Fitness/Other Club Memberships					
Gas					
Health Insurance					
Home Owner's Insurance					
Investments					
Life Insurance					
Mobile Phone					
Mortgage/Rent					
Property Taxes					
Subscriptions 1 (e.g., Audio, Newspaper, Magazine, Books, Streaming TV, Delivery Services)					
Subscriptions 2					
Subscriptions 3					
Home Telephone					
Trash/Recycling					
Tuition					
Water/Sewer					



# SWITCH KIT

## PERSONAL ONLINE & MOBILE BANKING AND BILL PAY SIGN-UP

View all your Resolute Bank accounts, see if checks have cleared, transfer funds, pay bills, and more anytime, anywhere with Online, Mobile Banking and Bill Pay. Go to our website and sign up today or to help get you started, we will be happy to assist you with this initial registration.

Print your existing payee screens to use as a reference when setting up your new Online bill pay service, or use this helpful form. Please see a member of our Client Experience Team for information and assistance with this convenient banking service.

[www.resolutefsb.com](http://www.resolutefsb.com)

**Payee Name:**

**Address:**

**Phone:**

**City, State, Zip:**

**Account Number:**

**Payee Name:**

**Address:**

**Phone:**

**City, State, Zip:**

**Account Number:**

**Payee Name:**

**Address:**

**Phone:**

**City, State, Zip:**

**Account Number:**

**Payee Name:**

**Address:**

**Phone:**

**City, State, Zip:**

**Account Number:**



# SWITCH KIT

## CLOSED ACCOUNT REQUEST – PERSONAL

Date:

Old Bank's Name:

Address:

City, State, Zip:

### TO WHOM IT MAY CONCERN:

Please close the following account #  
and send me a check for the remaining balance to the address below.

If you have any questions, please don't hesitate to call me at \_\_\_\_\_  
Sincerely,

. Thank you.

Print Name:

Address:

Signature:

City, State, Zip:

State Of

County Of

The foregoing instrument was acknowledged before me this \_\_\_\_\_ (Date) by

(name of person acknowledged).

Notary Public, State of

Printed Name

My Commission Expires:





# SWITCH KIT

## TRANSFER TIPS

The amount of time it takes to transfer an automatic payment or deposit varies, depending on the transaction type. For planning, use the following as a basic guide.

### AUTOMATIC DEPOSITS

<b>Payroll</b>	<b>14-60 days</b>
<b>Pension</b>	<b>60-90 days</b>
<b>Social Security</b>	<b>30-60 days</b>

### AUTOMATIC PAYMENTS

<b>Mortgage</b>	<b>30-60 days</b>
<b>Installment Loans</b>	<b>30-60 days</b>
<b>Auto</b>	<b>30-60 days</b>
<b>Insurance</b>	<b>30-60 days</b>
<b>Utilities</b>	<b>30-60 days</b>
<b>Cable/Internet</b>	<b>30-60 days</b>
<b>Membership Dues</b>	<b>30-60 days</b>

### OTHER AUTOMATIC TRANSFERS TO CONSIDER:

**Child Support Payments**

**Tax Payments**

**Automatic Transfers to Savings/IRA's from Existing Account(s)**

