



## *Our Switch Kit will help take the hassle out of switching banks...*

First and foremost, you need to go to your nearest Citizens National Bank branch to open an account. You will need the following information to complete the personal checking account opening process:

- \* Valid ID with Current Address
  - If your ID does not have your current address, bring a piece of mail with your name and address on it as verification
- \* Social Security Number
- \* \$100 deposit

## *Switch to Citizens National Bank*

*This packet contains the following information to help make your switch to CNB as easy as possible!*

- Sign and mail your **Authorization to Change Direct Deposit** form to your payroll department and any one else that automatically deposits funds to your account. If you are receiving Social Security or a government payroll or pension payment, go to [www.godirect.gov](http://www.godirect.gov) or call (800) 333-1795.
- Sign and mail your **Authorization to Change Automatic Payment** form to all companies that are receiving automatic payments from your former financial institution.
- Go to [www.cnbsomerset.com](http://www.cnbsomerset.com) to enroll in CitizensNet online banking with bill payment. If you have payees, or scheduled or recurring online bill payments with your current institution, switch them to CNB.

After you verify that all your automatic deposits and payments have been switched to your CNB account, you need to close the account at your former institution. Make sure you leave enough money in your old account to cover any outstanding checks (for 10 days). Finally, shred any unused checks, deposit slips, and ATM or check cards from your old account.



## *Authorization to Change Direct Deposit*

**My account to the following financial institution has been closed:**

Name of Former Financial Institution: \_\_\_\_\_

Former Routing Number: \_\_\_\_\_

Former Account Number: \_\_\_\_\_

Name on Account: \_\_\_\_\_

SSN/TIN: \_\_\_\_\_

**Please establish direct deposit into my CNB account.**

Company to receive this form: \_\_\_\_\_

CNB Routing Number: 042101446

New CNB Account Number: \_\_\_\_\_

*I have enclosed a deposit slip to verify my new CNB account number.*

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



## Authorization to Change Automatic Payment

Mail this form to the company that you have an automatic draft with before your next payment is due.

**I hereby authorize automatic payment/draft from my new CNB account:**

Company to receive this form: \_\_\_\_\_

Account Number: \_\_\_\_\_

CNB Routing Number: 042101446

New CNB Account Number: \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Daytime Phone Number \_\_\_\_\_

## Automatic Payment Change Notification

Consult the Automatic Payment Checklist to determine which companies you need to notify that you have switched your checking account to **Citizens National Bank**. After notification, these companies should establish automatic payments from your new checking account. If you have any questions, please contact **Citizens National Bank**.

### Automatic Payment Checklist

- |   |   |   |                                     |
|---|---|---|-------------------------------------|
| <input type="checkbox"/> Mortgage               | <input type="checkbox"/> Telephone      | <input type="checkbox"/> Electricity      | <input type="checkbox"/> Water      |
| <input type="checkbox"/> Cell Phone             | <input type="checkbox"/> Gas            | <input type="checkbox"/> Internet         | <input type="checkbox"/> Cable      |
| <input type="checkbox"/> Home Insurance         | <input type="checkbox"/> Auto Insurance | <input type="checkbox"/> Health Insurance | <input type="checkbox"/> Car Loan   |
| <input type="checkbox"/> Credit Card _____      |   | <input type="checkbox"/> Charity          | <input type="checkbox"/> Other Loan |
| <input type="checkbox"/> Credit Card _____      |   |   |                                     |
| <input type="checkbox"/> Dept. Store Card _____ |   |   |                                     |

As you make the switch, Citizens National Bank wants to ensure that you have not omitted any payments. As a suggestion, we recommend that you review your last three financial statements.



## Request & Approval to Change Automatic Transfer

Print and complete a copy of this form to notify any banks or companies that you are authorizing your automatic transfer (loan payment, transfers to brokerage accounts, transfers to savings accounts, etc) to your new CNB account.

**FROM:**

Name of Former Financial Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_

**TO:**

Name of Financial Institution: \_\_\_\_\_

Account Number: \_\_\_\_\_

Schedule/Frequency: \_\_\_\_\_

**Please use this letter as my authorization to switch the transfer to the below listed account at CNB.**

CNB Routing Number: 042101446

CNB Account Number: \_\_\_\_\_

**All other aspects of the transfer should remain the same. Please make this change effective:**

**If you need further information I can be contacted at:** \_\_\_\_\_

Signature

Date



## *Switch Checklist*

*To ensure a smooth transition, please go over this checklist and make sure you've covered everything you need to start banking with CNB.*

- Open your CNB checking and savings account.**
- Change your direct deposits to your new CNB account.**
- Change your automatic transfers over to your new account.**
- Change your automatic payments and drafts over to your new CNB account.**
- Close your checking accounts at your old financial institution.**
- Enroll in CitizensNet and set up your bill payments.**
- Find your local CNB institution and ATMs.**

**[www.cnbsomerset.com](http://www.cnbsomerset.com)**

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Member FDIC