

Personal Account Checklist

To help you switch, please use this handy checklist to make sure we'll have all the materials needed to successfully open and switch your account(s)!

Please be prepared with the following information for each account signer:

- Name
- Date of Birth
- Social Security Number
- Driver's License Number
- Address (physical street address)
- Phone Number
- Other Documentation as Needed (i.e. Certificate of Trust Existence)

If moving from another financial institution, we need the following information to assist you:

- To close previous bank account(s) - provide bank name and account number(s)
- To switch Automatic Payments - provide a bill statement from each merchant you make automatic payments to
- To switch Direct Deposits - provide the authorization from your employer, or you may use our simple form
- To switch Government Direct Deposits (i.e. Social Security) - provide your claim or payroll ID number

We can also help you order checks and set up Internet Banking, Online Bill Pay, and ATM/Debit Card, and so much more!