OUR **SWITCH KIT**

*A **comprehensive guide** for **seamlessly** switching banks.*

LONGVIEW BANK

Moving to a new bank can be time-consuming and requires effort. However, having a trusted partner to assist you throughout the process can make it worthwhile.

Here are some steps to follow to save time, money, and frustration during your transition. If you choose to move to Longview Bank, our team is here to help! We provide hands-on guidance during the transition and continue to offer exceptional service throughout our partnership with you.

1 OPEN YOUR NEW ACCOUNT

TIPS

- To reduce stress when switching banks, choose a month with fewer financial obligations, avoiding busy times like holidays or tax season.
- Keep some money in your old account for the first billing cycle to cover any upcoming charges, and check for minimum balance requirements to avoid fees.
- When opening your new account, bring the necessary forms and consider checking for electronic options. With Longview Bank, you can complete forms online or download them for submission via email, fax, or in person.

2 APPROACH THE TRANSITION IN STAGES

TIPS

- To ensure timely fund receipt, first update your direct deposit information. Complete Form 1 on page 4 and submit it to your employer or the Social Security Administration. You can also update this information online or by calling 800-772-1213.
- Review your account transactions from the past year and use the worksheet on page 5 to list vendors needing updates, including payroll, Social Security, rent, utilities, insurance, investments, and subscriptions. Don't forget to include quarterly or annual payments, like taxes.
- Set specific times over several days or weeks to make these updates, prioritizing vendors with the earliest payments or grouping them by category. You can typically update your payment info through each vendor's online portal or by completing Form 2 on page 4 and sending it to them.

3 WAIT AT LEAST ONE BILLING CYCLE

TIPS

- To ensure a successful transfer of all debits and deposits, keep your old account open for at least one full billing cycle (30 days).
- During this time, monitor your email and old bank account for any missed payments or deposits.
- Also, make sure that all outstanding checks and pending payments have cleared before closing your old account.

4 CLOSE THE OLD ACCOUNT

TIPS

- Once you are sure that all transactions are being processed through your new account, it is time to close your old account. Contact your bank to check if you need to visit in person or make an appointment to complete this process.
- Request written confirmation once your old account is fully closed to avoid any future fees. Additionally, monitor your email for any missed payments or deposits.

REMINDER: If you're moving to Longview Bank, please reach out to our team for assistance! We provide hands- on guidance during your transition and continue to offer exceptional service throughout our partnership.

For more information and support, contact Longview Bank at 217-582-2175.

Please update the account information for my direct deposit.

DATE

COMPANY MAKING DIRECT DEPOSIT

COMPANY ADDRESS

CITY, STATE, ZIP

TO WHOM IT MAY CONCERN:

Please update the details of where my paycheck is currently deposited to the new bank account information provided below.

MY OLD BANK

MY OLD BANK'S ROUTING NUMBER

MY OLD ACCOUNT NUMBER

Please start making automatic deposits into my new account at Longview Bank.

LONGVIEW BANK ROUTING NUMBER

MY NEW ACCOUNT NUMBER

If you have any questions regarding this request, please call or email me. Thank you.

NAME (PLEASE PRINT)

SIGNATURE

ADDRESS

CITY, STATE, ZIP

PHONE NUMBER

EMAIL

Please provide your employer with a voided Longview Bank check (not a deposit slip) along with your request.

LONGVIEW BANK

Please update the account information for my automatic payments.

DATE

COMPANY MAKING DIRECT DEPOSIT

COMPANY ADDRESS

CITY, STATE, ZIP

TO WHOM IT MAY CONCERN:

I recently switched to Longview Bank. You are currently withdrawing $_____ each month from the following account:

MY OLD BANK

MY OLD BANK'S ROUTING NUMBER

MY OLD ACCOUNT NUMBER

Please refrain from making withdrawals from this account and instead, start making them from my new Longview account:

FOR (PAYMENT OR REASON)

ON (DATE OF MONTH)

LONGVIEW BANK ROUTING NUMBER

MY NEW ACCOUNT NUMBER

Please call or email me if you have any questions regarding this request. Thank you.

NAME(PLEASE PRINT)

SIGNATURE

ADDRESS

CITY, STATE, ZIP

PHONE NUMBER

EMAIL

Please provide your employer with a voided check from Longview Bank (not a deposit slip) with your request.

Account Closing Letter

DATE

BANK'S NAME

BANK ADDRESS

CITY, STATE, ZIP

Please consider this an official notice to close my account(s) at your financial institution. Thank you. I've listed the accounts I want to be closed. Please send me a check for the closing balance to the address provided in this letter.

ACCOUNT NUMBER	CHECKING ( )	SAVINGS ( )	OTHER ( )
ACCOUNT NUMBER	CHECKING ( )	SAVINGS ( )	OTHER ( )
ACCOUNT NUMBER	CHECKING ( )	SAVINGS ( )	OTHER ( )
ACCOUNT NUMBER	CHECKING ( )	SAVINGS ( )	OTHER ( )

If you have any questions regarding this request or need additional authorization forms, please contact me at the number provided below. Thank you in advance for your cooperation.

Sincerely,

NAME (PLEASE PRINT)

SIGNATURE

ADDRESS

CITY, STATE, ZIP

PHONE NUMBER

EMAIL

LONGVIEW BANK

Transfer Checklist

	Company/ Financial Institution	Account Number	Type of Account	Date Mailed or Contacted	Follow-Up Date	Item Completed
Direct Deposit						
Direct Deposit						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Credit Card Balance						
Transfer Credit Card						
Automatic Closure						
Automatic Closure						

EQUAL HOUSING LENDER

LONGVIEW BANK

Member FDIC