



SWITCHKIT

YOU WORK HARD FOR YOUR MONEY. YOU SHOULDN'T HAVE TO WORK HARD TO MOVE IT.
Switching banks doesn't have to be a hassle. We can help make sure your switch to Pinnacle Bank is as easy as possible.

1) ESTABLISH A NEW ACCOUNT WITH PINNACLE BANK

Visit your local Pinnacle Bank or apply online at pinnbank.com.

2) MOVE YOUR AUTOMATIC PAYMENTS AND DEPOSITS TO YOUR NEW ACCOUNT

We've provided the forms you'll need. Just fill in the blanks and sign. Or, bring us a list of your payees and companies that credit your account and we'll take care of the change for you.

3) CLOSE YOUR OLD ACCOUNT

We've provided a letter that notifies your old bank about the accounts you are closing and gives directions for disbursement of any remaining funds. Just make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.

4) QUICK CHECKLIST

To help you keep track of your switch, we've included a quick checklist. You can use this form to track all of the information you need to move your direct deposits, payments, and close your old account. Or, one of our bankers can take care of the switch for you and keep you informed of the progress.

Be sure to shred or destroy any unused checks, deposit slips, and ATM or check cards. Don't forget about other items such as your savings account, safe deposit box, loans or lines of credit and credit cards. We can help move these accounts as well.



DATE _____

TO (Company) _____

ADDRESS _____

CITY, STATE, ZIP _____

RE: INSTRUCTIONS FOR CHANGING DIRECT DEPOSIT

Dear Employer,

I have recently changed banks and will need to have my payroll direct deposit switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME _____

SOCIAL SECURITY # _____

I currently have my direct deposit going to:

FINANCIAL INSTITUTION _____

ACCOUNT # _____

BANKING ROUTING # _____

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) _____

ACCOUNT # _____

BANKING ROUTING # 104913912

If for any reason you may need additional information, please call me at: _____.

Thank You.

Sincerely,

SIGNATURE _____

PRINT NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

ENCLOSED: Voided check from my new Pinnacle Bank account.



DATE _____

TO (Company) _____

ADDRESS _____

CITY, STATE, ZIP _____

RE: INSTRUCTIONS FOR CHANGING AUTOMATIC DEPOSITS

Dear Sir or Madam,

I have recently changed banks and will need to have my automatic deposit switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME _____

SOCIAL SECURITY # _____

MY ACCOUNT # WITH YOUR ORGANIZATION _____

DEPOSIT AMOUNT (if applicable) _____

I currently have my automatic deposit going to:

FINANCIAL INSTITUTION _____

ACCOUNT # _____

BANKING ROUTING # _____

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) _____

ACCOUNT # _____

BANKING ROUTING # 104913912 _____

If for any reason you may need additional information, please call me at: _____ .

Thank You.

Sincerely,

SIGNATURE _____

PRINT NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

ENCLOSED: Voided check from my new Pinnacle Bank account.



DATE _____

TO (Company) _____

ADDRESS _____

CITY, STATE, ZIP _____

RE: INSTRUCTIONS FOR CHANGING AUTOMATIC PAYMENTS

Dear Sir or Madam,

I have recently changed banks and will need to have my automatic payments switched from my old account to my new account with Pinnacle Bank. Below you will find any personal information you may need to aid in this process.

NAME _____

SOCIAL SECURITY # _____

MY ACCOUNT # WITH YOUR ORGANIZATION _____

DEPOSIT AMOUNT (if applicable) _____

I currently have my automatic payments coming from:

FINANCIAL INSTITUTION _____

ACCOUNT # _____

BANKING ROUTING # _____

Please change this to my new account with Pinnacle Bank as soon as possible:

TYPE OF ACCOUNT (CHECKING OR SAVINGS) _____

ACCOUNT # _____

BANKING ROUTING # 104913912 _____

If for any reason you may need additional information, please call me at: _____ .

Thank You.

Sincerely,

SIGNATURE _____

PRINT NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

ENCLOSED: Voided check from my new Pinnacle Bank account.



SWITCHKIT | ACCOUNT CLOSING REQUEST

DATE _____

TO (Financial Institution Name) _____

ADDRESS _____

CITY, STATE, ZIP _____

FROM (Name(s) on Account) _____

SOCIAL SECURITY # _____

PLEASE CLOSE THE FOLLOWING ACCOUNTS WITH YOUR INSTITUTION:

ACCOUNT TYPE	ACCOUNT #	SEND PAYMENT AT ONCE	DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT

FORWARD FUNDS TO ME AT THE FOLLOWING ADDRESS:

Together with all the interest or dividends that may have become due on above listed accounts

ADDRESS _____

CITY, STATE, ZIP _____

If for any reason you may need additional information, please call me at: _____ .

Thank You.

Sincerely,

SIGNATURE _____

JOINT ACCOUNT HOLDER SIGNATURE _____

DATE _____



YOUR PINNACLE BANK ACCOUNT # _____

YOUR PINNACLE BANK ROUTING # 104913912

DIRECT DEPOSITS

COMPANY (Name/Address)	DATE LETTER MAILED	ESTIMATED SWITCHING DATE (Assume 2 months)	STATUS

AUTOMATIC PAYMENTS

COMPANY (Name/Address)	DATE LETTER MAILED	ESTIMATED SWITCHING DATE (Assume 2 months)	STATUS

CLOSE OLD ACCOUNT *(Make sure all your outstanding checks have cleared.)*

OUTSTANDING CHECK PAYABLE TO:	OUTSTANDING CHECK #	OUTSTANDING CHECK AMOUNT	DATE CLEARED



THE WAY BANKING SHOULD BE