

SwitchKit



**You work hard for your money.
You shouldn't have to work hard to move it.**

Switching banks shouldn't be a hassle. That's why we designed our SwitchKit to help make your switch to Pinnacle Bank as easy and convenient as possible.

Along with the enclosed step-by-step Switch Checklist, we've included valuable forms to help you:

- ◆ Switch your automatic deposits
- ◆ Move your automatic payments
- ◆ Track your progress
- ◆ Close your old account

We want you to have the resources you need to feel confident in your switch to Pinnacle Bank. If you would like further assistance, we are happy to help. One of our bankers can even take care of the switch for you, keeping you informed of the progress.

If you need help switching your savings account, safe deposit box, loans or lines of credit, we can help move these accounts as well.

 **Pinnacle Bank**
THE WAY BANKING SHOULD BE



SwitchKit

We make it easy to switch to Pinnacle Bank.

Follow this simple checklist to make your move as smooth as possible.

- Open your new account(s) at Pinnacle Bank.
- Fill out the Direct Deposit and Automatic Payments forms found in your SwitchKit.
- Make sure all checks have cleared, and all your automatic payments and deposits have been switched over before you close your old account.
- Close your old account by notifying your old bank with the enclosed Account Closing Request.
- Destroy all unused checks, deposit slips and debit cards from your old account.
- Keep your new Pinnacle Bank routing and account numbers handy for direct deposits and automatic withdrawal requests.
- Ask us how we can help you switch your savings accounts, safe deposit box, loans or lines of credit and more.

Authorization for Direct Deposit

TO: _____

(Employer)

Please switch my Direct Deposit to Pinnacle Bank Starting:

DATE: ____ / ____ / _____

NEW ACCOUNT #: _____

(Attached is voided check)

NEW BANK ROUTING #: _____ 104913912

SWITCHING FROM: _____

(Name of Previous Financial Institution)

OLD ACCOUNT #: _____

OLD BANK ROUTING #: _____

ACCOUNT HOLDER: _____

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (____) ____ - _____

SIGNATURE: _____

PRINTED NAME: _____

Authorization for Automatic Payments

SERVICE PROVIDER: _____

MY ACCOUNT # WITH YOUR ORGANIZATION: _____

PLEASE SWITCH MY AUTOMATIC PAYMENT TO PINNACLE BANK STARTING: DATE: ____ / ____ / _____

TYPE OF ACCOUNT: _____
(Checking or Savings)

NEW ACCOUNT #: _____
(Attached is Voided Check)
NEW BANK ROUTING #: _____ 104913912

SWITCHING FROM: _____
(Name of Previous Financial Institution)
OLD ACCOUNT #: _____
OLD BANK ROUTING #: _____

ACCOUNT HOLDER: _____
ADDRESS: _____
CITY, STATE, ZIP: _____
DAYTIME PHONE: (_____) _____ - _____

SIGNATURE: _____
PRINTED NAME: _____

Track your Switch

You can use this form to keep track of all the information you need to move your direct deposits, payments and close your old account.

YOUR PINNACLE BANK ACCOUNT # _____

YOUR PINNACLE BANK ROUTING # 104913912

DIRECT DEPOSIT

ONE	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

TWO	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

THREE	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

AUTOMATIC PAYMENTS

ONE	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

TWO	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

THREE	COMPANY: (Name/Address)		
	DATE OF NOTIFICATION:	/ /	STATUS
	ESTIMATED SWITCHING DATE:	/ /	

Track your Switch

OUTSTANDING CHECKS

ONE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
TWO	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
THREE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
FOUR	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
FIVE	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
SIX	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
SEVEN	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /
EIGHT	OUTSTANDING CHECK PAYABLE TO:	
	OUTSTANDING CHECK #:	
	OUTSTANDING CHECK AMOUNT:	
	DATE CLEARED:	/ /

Make sure all your outstanding checks have cleared.

Account Closing Request

DATE: ____ / ____ / ____

TO: _____
(Financial Institution Name)

ADDRESS: _____

CITY, STATE, ZIP: _____

FROM: _____
(Name(s) on Account)

LAST 4 DIGITS OF SOCIAL SECURITY #: _____

PLEASE **CLOSE** THE FOLLOWING ACCOUNTS WITH YOUR INSTITUTION:

ACCOUNT 1	ACCOUNT TYPE:	
	ACCOUNT #:	
	SEND PAYMENT AT ONCE <input type="checkbox"/>	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/>
ACCOUNT 2	ACCOUNT TYPE:	
	ACCOUNT #:	
	SEND PAYMENT AT ONCE <input type="checkbox"/>	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/>
ACCOUNT 3	ACCOUNT TYPE:	
	ACCOUNT #:	
	SEND PAYMENT AT ONCE <input type="checkbox"/>	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/>
ACCOUNT 4	ACCOUNT TYPE:	
	ACCOUNT #:	
	SEND PAYMENT AT ONCE <input type="checkbox"/>	OR DEFER PAYMENT UNTIL CLOSE OF INTEREST PAYMENT <input type="checkbox"/>

FORWARD FUNDS TO ME AT THE FOLLOWING ADDRESS:

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: (_____) _____ - _____

SIGNATURE: _____

JOINT ACCOUNT HOLDER SIGNATURE: _____

PRINTED NAME: _____



Locate the Pinnacle Bank branch or ATM nearest you by visiting us online at pinnbank.com/locations.

Customer Support Center: 1.800.227.7715

Call for online banking and account related assistance, including debit cards.

pinnbank.com | Telebank: 1.800.881.7219



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