



WELCOME TO FIRST SERVICE BANK!

We understand that the decision to switch banks can seem challenging, but we are here to make it easy for you! This switch kit will give you the tools to help make the transition as smooth as possible.

First Service Bank offers several business and cash management services that can help you grow your business! Services include Commercial Online Banking with bill pay and electronic statements, Remote Deposit Capture, Merchant Services, Credit Cards, and more! Our extended hours through the Video Teller Machines and Call Center are just another way to help serve you better.



Get Started with 5 Easy Steps!



1

Open and start using your new account with First Service Bank. Speak with any of our associates to find out about Commercial Accounts and Cash Management Services.



2

Stop using your old account. Allow any outstanding checks to clear



3

Switch any direct deposits, like payroll or retirement benefits from your old account to your new account.



4

Switch any automatic payments or withdrawals, like mortgage, subscriptions, and utilities from your old account to your new account.



5

Close your old account. Be sure all checks have cleared and any deposits or automatic payments have been switched.

Switch Kit Contents

Direct Deposit Change Notification

Use this letter to change where your direct deposits from your employer, retirement plan, or government payments like Social Security benefits are being sent. When changing Social Security benefit payments you may also call 1-800-333-1795 or go to GoDirect.org to update your direct deposit. Be sure to attach a voided check with each letter.

Automatic Payment Change Notification

Use this letter to switch an automatic payments or withdrawals from your former bank account and to now be debited from your new First Service Bank account. Complete the letter, sign, and mail the letter to the billing company or organization that receives your payment. Remember to also switch any payments that use your debit card number as opposed to your checking account number.

Request to Close Account

Use this letter to request the closure of your old bank account. Feel free to make as many copies as you need. Double check your old account to confirm that all outstanding checks have cleared. Complete the letter, sign, and mail the letter after all direct deposits and automatic payments have been switched.

Financial Services Provider Notification

Use this letter to notify important financial services providers and consultants that your business checking account has been switched. This might include accountants, tax preparers, attorneys, insurance agents, etc.

Switch Kit Checklist

Use this checklist to keep up with any bank or financial services accounts you currently have in order to ensure a smooth transition to First Service Bank. This form is for your use only and is not meant to be distributed to any other banks or companies.

Please note: *We cannot guarantee that these forms will be accepted in every instance. Your former bank, and/or companies depositing or drafting your account(s), may require you to make any or all of these requests in person or by some other method. Also, they may require more or different information than is contained on the letter templates within this switch kit.*

Tip: *Make sure to keep this sensitive account information secure. Use caution if sending email requests to other banks or companies that contain sensitive information as it may not be as secure.*

Direct Deposit Change Notification

Name of Company: _____

Company Address: _____

Deposit Frequency (circle one): Monthly / Weekly / Every two weeks / Other: _____

To whom it may concern:

I have switched my account to First Service Bank. Please change my direct deposit from the following account:

Former Bank Name: _____

Former Account #: _____ Former Bank Routing #: _____

Effective immediately, please make all future direct deposits to the following account:

New Bank Name: First Service Bank

New Account #: _____ New Bank Routing #: 082907875

Please contact me if you have any questions regarding this request. Thank you,

Name (please print)

Signature

Address

City, State, ZIP

Phone Number

Please include a voided First Service Bank check with your request.

Automatic Payment Change Notification

Name of Company: _____

Company Address: _____

Account Number: _____ Payment Amount: _____

To whom it may concern:

I have switched my account to First Service Bank. Please change my automatic payment from the following account:

Former Bank Name: _____

Former Account #: _____ Former Bank Routing #: _____

Effective immediately, please make all future automatic payments from the following account:

New Bank Name: First Service Bank

New Account #: _____ New Bank Routing #: 082907875

Please contact me if you have any questions regarding this request. Thank you,

Name (please print)

Signature

Address

City, State, ZIP

Phone Number

Financial Services Provider Notification

Name of Company: _____

Company Address: _____

To whom it may concern:

I am sending this letter to notify you that I have recently transitioned to First Service Bank. Please update your records, effective immediately, so that all activities are now directed to our new First Service Bank account.

Former Bank Information:

Former Bank Name: _____

Former Account #: _____ Former Bank Routing #: _____

New Bank Information:

New Bank Name: First Service Bank

New Account #: _____ New Bank Routing #: 082907875

Please contact me if you have any questions regarding this request. Thank you,

Name (please print)

Signature

Address

City, State, ZIP

Phone Number

Request to Close Account

Bank Name: _____

Bank Address: _____

Request to Close Account #'s: _____ Date: _____

To whom it may concern:

Please accept this letter as written authorization to close the account number(s) listed above. Send me a check for the remaining balance in the account(s) to my address below. I have confirmed that all checks have cleared, direct deposits moved, and automatic payments have stopped.

Your prompt attention to this matter is greatly appreciated.

Please contact me if you have any questions regarding this request. Thank you,

Name (please print)


Signature

Address

City, State, ZIP

Phone Number

Switch Kit Checklist

 FIRST SERVICE BANK	Bank or Company Name	Account Number / Service	Date Contacted	Item Complete
Direct Deposit				<input type="checkbox"/>
Direct Deposit				<input type="checkbox"/>
Automatic Payment				<input type="checkbox"/>
Automatic Payment				<input type="checkbox"/>
Automatic Payment				<input type="checkbox"/>
Automatic Payment				<input type="checkbox"/>
Account Closure				<input type="checkbox"/>
Account Closure				<input type="checkbox"/>
Account Closure				<input type="checkbox"/>
Financial Services Provider				<input type="checkbox"/>
Financial Services Provider				<input type="checkbox"/>
Other				<input type="checkbox"/>
Other				<input type="checkbox"/>

- First Service Bank account opened
- Commercial Online Banking form complete
- Cash Management Services enrolled: _____
- Checks, deposit slips, and other materials ordered
- Debit cards activated
- Destroyed unused check stock and debit cards attached to old bank
- Other: _____
- Other: _____

Congratulations!

You have successfully switched to First Service Bank. Thank you for trusting us with your financial needs. We are so happy to have you! Contact us with any questions or comments at 1.800.669.2517.