



## **SWITCH KIT**

**YOU WORK HARD FOR YOUR MONEY, MAKE IT WORK HARDER FOR YOU.**

**Switching banks doesn't have to be a hassle. Ambler Savings Bank can make your switch a walk in the park.**

### **1) OPEN A NEW ACCOUNT WITH AMBLER SAVINGS BANK**

Stop into any of our local branches to open an account. Bring your driver's license with you and have your social security number and birth date ready to provide to the customer service representative. Some Ambler Savings Bank accounts require a minimum balance to open the accounts, be prepared to make a deposit into your new account.

### **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 help 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 customer service representatives can help.

***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 and lines of credit. We can help move these accounts as well.***



# AUTHORIZATION FOR DIRECT DEPOSIT

To: \_\_\_\_\_

*(Employer)*

Please Switch My Direct Deposit To

**AMBLER SAVINGS BANK**

Beginning On: \_\_\_\_ / \_\_\_\_ / \_\_\_\_\_

*(Date)*

New Account #: \_\_\_\_\_

*(Attached is voided check)*

New Bank Routing #: 23-1371634

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 WITHDRAWALS

Service Provider: \_\_\_\_\_

My Account # With Your Organization: \_\_\_\_\_

Please Switch My Automatic Withdrawals To:

**AMBLER SAVINGS BANK**

Beginning On: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

*(Date)*

Type of Account: \_\_\_\_\_

*(Checking or Savings)*

New Account #: \_\_\_\_\_

*(Attached is Voided Check)*

New Bank Routing #: 23-1371634

Switching From: \_\_\_\_\_

*(Name of Previous Financial Institution)*

Old Account #: \_\_\_\_\_

Old Bank Routing #: \_\_\_\_\_

Account Holder: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_





# 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:

|                   |   |   |
|-------------------|---|---|
| <b>ACCOUNT #1</b> | Account Type  |   |
|                   | Account   |   |
|                   | Send Payment at Once <input type="checkbox"/> (CHECK ONE) | Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE) |
| <b>ACCOUNT #2</b> | Account Type  |   |
|                   | Account   |   |
|                   | Send Payment at Once <input type="checkbox"/> (CHECK ONE) | Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE) |
| <b>ACCOUNT #3</b> | Account Type  |   |
|                   | Account   |   |
|                   | Send Payment at Once <input type="checkbox"/> (CHECK ONE) | Or Defer Payment Until Close of Interest Payment <input type="checkbox"/> (CHECK ONE) |

Forward funds to me at the following address:

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Daytime Phone: \_\_\_\_ - \_\_\_\_ - \_\_\_\_\_

Signature: \_\_\_\_\_

Joint account Holder Signature: \_\_\_\_\_

Printed Name: \_\_\_\_\_



## SWITCH CHECKLIST

We make it easy to switch to Ambler Savings Bank. Just follow our Simple checklist to make your move as smooth as possible.

- Open your new account(s) at Ambler Savings Bank.
- Fill out the enclosed Direct Deposit, Automatic Deposit and Automatic Payment forms.
- Make sure all of your checks have cleared and your automatic payments and deposits have been switched before you close your account.
- Close your account by notifying your old bank with the enclosed form.
- Destroy all unused checks, deposit slips, ATM and check cards. Keep your new Ambler Savings Bank routing and account numbers handy for direct deposit and automatic withdrawal requests.

**AMBLER  
SAVINGS  
BANK**

Founded 1874

[www.AmblerSavingsBank.com](http://www.AmblerSavingsBank.com)





# 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 Ambler Savings Bank

Account #: \_\_\_\_\_

Your Ambler Savings Bank

Routing #: 23-1371634

## DIRECT DEPOSIT

|       |                          |   |   |        |
|-------|--------------------------|---|---|--------|
| ONE   | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |
| TWO   | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |
| THREE | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |

## AUTOMATED PAYMENTS

|       |                          |   |   |        |
|-------|--------------------------|---|---|--------|
| ONE   | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |
| TWO   | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |
| THREE | Company (Name/Address)   |   |   |        |
|       | Date Letter Mailed       | / | / | Status |
|       | Estimated Switching Date | / | / |        |



# TRACK YOUR SWITCH

## OUTSTANDING CHECKS

|              |                              |  |
|--------------|------------------------------|--|
| <b>ONE</b>   | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |
| <b>TWO</b>   | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |
| <b>THREE</b> | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |
| <b>FOUR</b>  | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |
| <b>FIVE</b>  | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |
| <b>SIX</b>   | Outstanding Check Payable To |  |
|              | Outstanding Check #          |  |
|              | Outstanding Check Amount     |  |
|              | Date Cleared                 |  |

(Make sure all your outstanding checks have cleared)

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