



## Switch Kit

Breaking up is never easy. But if your banking relationship isn't working for you, don't feel trapped. Escape to BayCoast Bank. Here's how....

**First Step – Open a BayCoast Bank checking account.** Bring the Account Information sheet into any of our fourteen convenient locations and a customer service representative will assist you. (Please remember to bring your driver's license or other form of identification and a \$10 minimum deposit.)

**Second Step – Change your direct deposit and/or automatic payments.** You may use our Direct Deposit Switch form and/or Automatic Payment Change form to notify your payroll department and any company or organization that is automatically withdrawing payments from your existing account that you are making a switch.

**Third Step – Close your account.** After you have made sure all your outstanding checks have cleared, your direct deposit is going into your new checking BayCoast Bank account and all your automatic payments are coming out of your new BayCoast Bank checking account, you may use our Close Account form to notify your bank that you wish to close the account. (This will finally bring you closure.)

**Account Information Sheet** - This form is used to assist us in opening your new account. Please remember to bring your driver's license or other form of identification and a \$10 minimum deposit along with this form to the branch.

**Direct Deposit Switch Form** - This form is to notify your employer that you would like to change your direct deposit.

**Automatic Payment Change Form** - This form is to notify any company that you have a recurring automatic payment with to change your automatic payment so that it comes from your new BayCoast Bank checking account. If you have more than one automatic payment, make copies of this form and send it to each company. Be sure to provide your new BayCoast Bank account number in the space provided. Also, if the billing company has assigned you an account number for the product and services they provide make sure you enter that in the space provided.

**Close Account Form** - This form is to notify and authorize your existing financial institution to close your account. Remember to make sure all your outstanding checks have cleared, your direct deposit is going into your new BayCoast Bank checking account and all your automatic payments are coming out of your new BayCoast Bank checking account, before you notify your bank that you wish to close the account.

# Direct Deposit Switch Form

Date

\_\_\_\_\_

Name

\_\_\_\_\_

Street Address

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number \_\_\_\_\_ Social Security Number \_\_\_\_\_

Please re-direct my current payroll direct deposit to my new account at BayCoast Bank.

Amount to be re-directed \_\_\_\_\_

BayCoast Bank Account Number \_\_\_\_\_

BayCoast Bank ABA Routing Number **211372239**

I hereby authorize the change listed above

\_\_\_\_\_  
Account Owner Signature



# Automatic Payment Change Form

Date \_\_\_\_\_

Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Subject: Request to change Automatic Payment for Account # \_\_\_\_\_

Please be advised that I've recently changed banks and would like to have my automatic account payment switched from my old account to my new account with BayCoast Bank. As per our original agreement, I authorize you to make automatic payment withdrawals.

BayCoast Bank Account Number \_\_\_\_\_

BayCoast Savings Bank ABA Routing Number **211372239**

If you need additional information, please contact me at (phone number) \_\_\_\_\_

I hereby authorize the change listed above

\_\_\_\_\_  
Account Owner Signature

\_\_\_\_\_  
Date



# Close Account Form

Please close my account listed below. Please send me/us a check for any remaining funds in the account to the address listed below. If you have any questions, please contact me/us at the phone number listed below. Thank you.

Date

\_\_\_\_\_

Name

\_\_\_\_\_

Street Address

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone # \_\_\_\_\_

Account # to be closed \_\_\_\_\_

Account Owner Name \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

I hereby authorize the closing of the account(s) listed above

\_\_\_\_\_  
Account Owner Signature Date

\_\_\_\_\_  
Account Owner Signature Date



Member FDIC/Member DIF

508-678-7641

