EASY SWITCH KIT





Everything you need for an easy transition to Citizens State Bank

We want to make your move to Citizens State Bank as easy as possible. That's why we developed this Easy Switch Kit with everything you'll need to close your existing accounts and transfer your automatic payments and deposits. You won't even need to visit your old bank. Simply follow these steps:

- Step 1 Open your new account at Citizens State Bank in Waverly or Montrose.
 - Stop in and one of our bankers will gladly assist you. When your new account is open, continue with Steps 2 and 3.
- Step 2 Change your direct deposits and automatic payments.

Simply complete the enclosed forms, Authorization to Change Direct Deposit and/or Authorization to Change Automatic Payment. Complete a form for each business. Attach a voided check from your new Citizens State Bank account to each authorization form. Mail them as soon as possible. (Some businesses may allow you to make these changes on their website or in their mobile app. Be sure you are on a secure website or network when providing personal information.)

Step 3 We'll help you close your old accounts.

Simply complete the enclosed form, Authorization to Close My Account and mail it to your old bank. This form gives them all the information they need and saves you the inconvenience of an in-person visit to close your accounts. (Select a closing date at least 45 days into the future, to allow checks you've written to clear and automatic deposits/payments to transfer to your new Citizens State Bank account.)



We look forward to serving you!

Waverly Office

609 Pacific Ave. • Waverly MN 55390 Main 763-658-4417 • Fax 763-658-4836 Mailing address

Citizens State Bank of Waverly PO Box 68 • Waverly MN 55390 Montrose Office

145 Nelson Blvd • Montrose MN 55363 Main 763-675-BANK (2265) • Fax 763-675-8148

CLOSE MY ACCOUNT



Authorization to

Close My Account

Todavis	ate

On	(date)* please close my □ Checki	ng Savings account at:	
Name of Financial Institution Where Account is Clos	old Account Numb	er	
Financial Institution Address			
Name of Account Holder(s)			
Primary Address of Account Holder			
On the close date (see above), please send remainir	ng funds to me at:		
Street Address or P.O. Box	City	State	Zip
Signature(s)		Phone	
♠ Equal Housing Lender	1/20 Authorization to		Member FDIC
CITIZENS STATE BANK WAVERLY & MONTROSE	Close My Account		Today's Date
On		ng Savings account at:	
Name of Financial Institution Where Account is Clos	Old Account Numb	er	
Financial Institution Address			
Name of Account Holder(s)			
Primary Address of Account Holder			
On the close date (see above), please send remainir	ng funds to me at:		
Street Address or P.O. Box	City	State	Zip
Signature(s)		Phone	

Complete this form for each checking and savings account you wish to close. *Allow time for all checks to clear and automatic payments/deposits to cease.

DIRECT DEPOSIT



Authorization to Change

Direct Deposit

Today's Date

I am in the process of closing my $\ \square$ Checking $\ \square$ Savings account	unt at:		
	Old Accoun	it Number	
Name of Financial Institution Where Account is Closing (Please Print			
Name of Account Holder(s)			
Primary Address of Account Holder			
Begin Direct Deposit into my new ☐ Checking ☐ Savings A	account, effective as of		
New Financial Institution: Citizens State Bank Routing Numb PO Box 68, Waverly MN 55390 • 76	per: 091905295	Date	
New Citizens State Bank Account Number		★★★ I have enclosed a voided cl	heck to verify the account number. $\star\star\star$
Signature(s)		Phone	
Complete this form for each depositor (employ	yer, Social Security, etc.) with w	/hom you have an arrangement for D	irect Deposit.
😑 Equal Housing Lender	1/20		Member FDIC
Aı	uthorization to Change		
CITIZENS	Direct		J. '. D.L.
STATE BANK WAVERLY & MONTROSE	Deposit	10	oday's Date
I am in the process of closing my Checking Savings accou	unt at:		
		it Number	
Name of Financial Institution Where Account is Closing (Please Print	•		
Name of Account Holder(s)			
Primary Address of Account Holder			
Begin Direct Deposit into my new	account, effective as of	Date	
New Financial Institution: Citizens State Bank Routing Numb PO Box 68, Waverly MN 55390 • 76			
New Citizens State Bank Account Number		★★★ I have enclosed a voided cl	heck to verify the account number. $\star\star\star$
Signature(s)		Phone	

Complete this form for each depositor (employer, Social Security, etc.) with whom you have an arrangement for Direct Deposit.

AUTOMATIC PAYMENT



Authorization to Change

Automatic Payment

Today	Date

I am in the process of closing my $\ \square$ Checking $\ \square$		
Name of Financial Institution Where Account is 9 Name of Account Holder(s)	Closing (Please Print)	umber
Primary Address of Account Holder		
I hereby authorize Automatic Payment from my ne	w Checking Savings Account, beginning.	
Payment amount \$Pa	ayment to	Date
My account number with your business		Company Name Payment frequency
New Financial Institution: Citizens State Bank PO Box 68, Waverly M	Routing Number: 091905295 IN 55390 • 763-658-4417	
New Citizens State Bank Account Number		★★★ I have enclosed a voided check to verify the account number. ★★★
Signature(s)		Phone
🗈 Equal Housing Lender		Member FDIC
	Authorization to Change	
CITIZENS	Automatic	Today's Date
STATE BANK WAVERLY & MONTROSE	Payment	loddy's Dale
I am in the process of closing my \square Checking \square	Savings account at:	
Name of Financial Institution Where Account is Cl	Old Account Nu	mber
Name of Account Holder(s)	,	
Primary Address of Account Holder		
I hereby authorize Automatic Payment from my new	☐ Checking Savings Account, beginning _	
Payment amount \$Pay	ment to	Date
My account number with your business		Company Name Payment frequency
New Financial Institution: Citizens State Bank PO Box 68, Waverly MI	Routing Number: 091905295 N 55390 • 763-658-4417	
New Citizens State Bank Account Number		$\star\star\star$ I have enclosed a voided check to verify the account number. $\star\star\star$
Signature(s)		Phone

Complete this form for each company or organization with whom you have an arrangement for Automatic Payment.

AUTOMATIC PAYMENTS CHECKLIST

Use this form to summarize all of the automatic payments from your current bank account (including automatic payments using your debit card number). Remember to list all frequencies: bi-weekly, monthly, quarterly, annually, etc... It may be helpful to review the last 12 months of your account statements for a complete list. Use the Authorization to Change Automatic Payments form to change each automatic payment or contact the company via phone or their website for their specific instructions. Make sure to keep your old account open long enough to transfer all automatic payments to your NEW account. Please let us know if you have any questions or if we can assist you.

Company Name	Frequency	Account Number at the Company	Amount	Date of Contact	Confirmation of Successful Transfer



We look forward to serving you!

Waverly Office

609 Pacific Ave. • Waverly MN 55390 Main 763-658-4417 • Fax 763-658-4836 Mailing address

Citizens State Bank of Waverly PO Box 68 • Waverly MN 55390 Montrose Office

145 Nelson Blvd • Montrose MN 55363 Main 763-675-BANK (2265) • Fax 763-675-8148