



Member FDIC

"Hometown Banking..."

Account Switch Kit

... Moving Made Easy"

Locations

HAMILTON

PO BOX 189
1281 MILITARY ST S
HAMILTON, AL 35570
Phone: (205)921-9400
Fax: (205)921-9708

HACKLEBURG

PO DRAWER A
34888 US HWY 43
HACKLEBURG, AL 35564
Phone: (205)395-1944
Fax: (205)935-3349

FLORENCE

1131 WILLS AVE.
FLORENCE, AL 35630
Phone: (256)766-6300
Phone: (888)766-6301
Fax: (256)766-6385

Welcome!

We would like to thank you for choosing PeoplesTrust Bank. We look forward to serving you and making this transition as smooth as possible.

Why Switch Now?

At PeoplesTrust Bank, you will receive personalized customer service from our friendly and knowledgeable staff. Switch now to receive your first order of checks FREE!

Switching is simple! Either ...

Fill out the forms included with this Switch Kit, bring it to any PeoplesTrust Bank office, and let us complete the process for you.

or:

Stop by any of our locations and let one of our hometown bankers assist you in opening your new account. We'll gather the necessary information, help you close your old account(s), and switch your direct deposit(s) and/or any automatic payment(s) you may have.

What you need...

All we need from you is a copy of your most recent bank statement and the names, addresses, phone numbers, account numbers, and amounts from any automatic payments you want to switch.

Complete the Application and Switch Kit and drop them off at the office nearest you!

Follow This Checklist!

Switch your checking to PeoplesTrust Bank and receive your first order of checks, free!

- Stop writing checks and/or using your debit card on your old account to make sure all checks have cleared. Make sure there are sufficient funds in your old account to cover all outstanding items – including automatic payments and internet bill payments.
- Cancel all recurring internet bill payments. Enroll online for our **free** PeoplesTrust Bank Bill Pay service.
- Make a list of companies that automatically withdraw payments from your account (see below) to let them know you are changing banks and account numbers. See our *Automatic Payments/Transfers – Change of Account Form*.

Automatic Payments

Company Name/Address	Date Mailed	Status

Before you close your old account, make sure the direct deposits and automatic payments are going to/coming from your new PeoplesTrust Bank account and all your outstanding checks have cleared.

- If you wish to continue using automatic payments, notify any old or new companies using the same *Automatic Payments/Transfers – Change of Account Form*.
- Send written notice about your new banking relationship to anyone who makes direct deposits to your account (including payroll, investments, etc.). See our *Direct Deposit – Change of Account Form*.
- Check maturity dates for any Certificates of Deposit you may have to avoid possible penalties.
- A written notice should be sent to your former financial institution requesting that the old account(s) be closed. You’ll need to provide direction regarding the disbursement of any remaining funds in your account(s). See our Request to Close Account Form.

PeoplesTrust Bank: New Account Application

Primary Applicant

☐ New ☐ Existing

Name (First, Middle, Last) or Business Name

Social Security #/Tax I.D. #

Date of Birth

of Dependents

Current Street Address

DL #

Issue/Expiration

City

State

Zip Code

Mailing Address (if different from above)

City

State/Zip

Previous Address (if living at current residence less than 2 yrs)

Yr.

Mo.

E-mail Address

How Long at Residence

Home Phone #

Business Phone #

Cell Phone #

Employer

Position Held

Previous Employer (if at current employer for less than 2 yrs)

Yr.

Mo.

Primary Applicant

☐ New ☐ Existing

Name (First, Middle, Last) or Business Name

Social Security #/Tax I.D. #

Date of Birth

of Dependents

Current Street Address

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Issue/Expiration

City

State

Zip Code

Mailing Address (if different from above)

City

State/Zip

Previous Address (if living at current residence less than 2 yrs)

Yr.

Mo.

E-mail Address

How Long at Residence

Home Phone #

Business Phone #

Cell Phone #

Employer

Position Held

Previous Employer (if at current employer for less than 2 yrs)

Yr.

Mo.

Additional Account Holder Information – please complete this section for multiple deposit owners						
Name(s)	New	Existing	Date of Birth	Social Security	Driver's License	
	☐	☐				
	☐	☐				
	☐	☐				
	☐	☐				

I certify that everything I have stated in this application and on any attachments is accurate. You may keep this application whether or not it is approved. By signing below I authorize you to check my credit and employment history and to answer questions others may ask you about my credit record with you. I understand that I must update this credit information at your request and/or if my financial condition changes.

X

Primary Applicant

Date

X

Co-Applicant

Date

Request to Close Account

TO:

Name of
Bank

Address

City
State, Zip

Please close my account as listed below:

Name(s) on
the Account

Account #

Type of
Account

☐ Joint Account (if applicable)

Please forward any remaining funds to me at:

Name

Address

City
State, Zip

If you have any questions, please contact me at the following number:

Phone

Thank you for your cooperation to this request.

X

Signature

Date

Direct Deposit – Change of Account

TO:

Company Name

Address

City State, Zip

FROM:

Customer Name

Address

City State, Zip

I have changed banks and need to have my direct deposit transactions redirected to PeoplesTrust Bank. Effective immediately, please use my new PeoplesTrust Bank account to process my direct deposit. Please change your records accordingly.

Attached is a VOIDED deposit slip from my new PeoplesTrust Bank account for accuracy in changing my transactions.

Social Security #

PeoplesTrust Bank Account #

X

Signature Date

X

Signature Date

Helpful hint: Be sure to check with your employer to make sure they will accept this form. Some require you to fill out a form of their own.

PeoplesTrust Bank Routing #

Automatic Payments/Transfers – Change of Account

TO:

Company
Name

Address

City
State, Zip

FROM:

Customer
Name

Address

City
State, Zip

I have changed banks and need to have my automatic payments redirected to my PeoplesTrust Bank account. Effective immediately, please use my new PeoplesTrust Bank account to process my payments/transfers. Please change your records accordingly.

Attached is a VOIDED deposit slip from my new PeoplesTrust Bank account for accuracy in changing my transactions.

PeoplesTrust Bank Routing # Billing

Account #

PeoplesTrust Bank Account #

X

Signature

Date

Daytime Phone Number