

# SIMPLE SWITCH KIT

*We Make the Switch Simple*

 **WELLS BANK**  
*“Your Lending Specialist”*

## 5 Simple Steps

### To Switch Your Account

#### The Process:

1 Open your Wells Bank account

Visit your local branch and a Personal Banking Representative will answer any questions and help you determine which checking account options are right for you.

2 Stop using your old account

Once you receive your Wells Bank checks and debit card by mail, discontinue use of your old checking account and allow all transactions to clear.

3 Change your direct deposits

Complete the enclosed form and submit it to your employer's human resources department and your retirement plan administrator along with a voided check. Note: to change Social Security Payments, call 1-800-722-1213. Do not send a letter.

4 Change automatic payments

Use the enclosed form or directly contact your previous bank to discontinue any automated payment services set to pay on a monthly basis. You may also use this form to stop all automated withdraws initiated by credit card companies, automated online payments or other vendors.

This is also a good time to sign up for Wells Bank Net Teller™ Online Banking. With Wells Bank Net Teller™ Online Banking, you can check balances, transfer money or pay bills with a click of the mouse.

5 Close your old account

This is the easiest part of all! Once you have confirmed that all transactions have cleared your previous bank account, submit the enclosed letter or contact them directly to have them close out your checking account and return any unused balance. Destroy and discard your checks, deposit slips and debit or ATM cards from your old account.







**Notice to Close Account**

\_\_\_\_\_

Date

\_\_\_\_\_

Bank Name (Attention: Personal Banking Representative)

\_\_\_\_\_

Address

\_\_\_\_\_

City

State

Zip

To Whom It May Concern:

Please close my account(s) described below effective \_\_\_\_\_

Date

Account Numbers to be closed:

Checking Account Number \_\_\_\_\_

Owners \_\_\_\_\_

Checking Account Number \_\_\_\_\_

Owners \_\_\_\_\_

Savings Account Number \_\_\_\_\_

Owners \_\_\_\_\_

Money Market Account Number \_\_\_\_\_

Owners \_\_\_\_\_

Other Account Number \_\_\_\_\_

Owners \_\_\_\_\_

Please forward all remaining funds by check to the following address:

\_\_\_\_\_

Address

\_\_\_\_\_

City

State

Zip

If you have any questions about this request, please feel free to call me. Thank you.

Phone (\_\_\_\_\_) - \_\_\_\_\_ Day/Evening (Circle One)

Sincerely,

\_\_\_\_\_

Account Holder Signature

\_\_\_\_\_

Joint Account Holder Signature

\_\_\_\_\_

Account Holder Print Name

\_\_\_\_\_

Joint Account (Please Print)