

bankSA

**Say goodbye to  
your other bank.**

BankSA Easy Switch™





# Switch your banking in five easy steps.

## **BEFORE YOU START - OPEN A NEW BANKSA BANK ACCOUNT.**

Before you start the process of switching to BankSA, you will need to have an account open. If you haven't already done this, visit a BankSA branch near you or call **13 13 76**. Registering for BankSA Phone and Internet Banking will also allow you to monitor and manage your account.

# 1

### **Stop using the bank account you wish to close - and start planning.**

Don't forget to leave sufficient funds to cover any outstanding cheques or automatic payments that may be charged to your other account.

Spend some time planning by working through previous account statements, identifying regular payments to and from your account - completing the *Current Account Activity Summary* as you go. Keep in mind that payment cycles can range from weekly, fortnightly, monthly, quarterly, half yearly or yearly.

# 2

### **Arrange to have your salary paid into your BankSA account.**

Complete the *Salary Transfer Request* form and send it to your employer/payroll department to have your salary paid into your account.

# 3

### **Transfer direct credits and debits.**

Where an organisation pays money directly into your account, such as dividends, government benefits or a pension, you'll need to transfer them.

Complete a *Direct Credit Transfer Request* form for each direct credit that you have identified, and send it to the relevant organisation.

If you pay a company by direct debit, complete a *Direct Debit Transfer Request* form for each direct debit that you have identified, and send it to the relevant company/person.

# 4

### **Transfer periodical payments.**

Make sure you cancel and transfer any automatic regular payments (perhaps you make loan and credit card payments to another bank) from your other account to your BankSA account. At BankSA, we can help you set up these payments.

# 5

### **Close your other account.**

When you are certain that your salary and various credits, debits and regular payments have been transferred to your BankSA account, it's time to close your other account(s). A separate *Account Closure Request* form is required for each account that you wish to close.

# Current Account Activity Summary.

## Direct Credits

Company/Person Crediting account	Reference	Frequency	Amount Credited	Payment Date	Instructions sent ✓	Completed ✓
Eg: Dowling Real-estate	12 34 56 7	Fortnightly	\$800.00	Every Second Thursday		

## Direct Debits

Company/Person Crediting account	Reference	Frequency	Amount Credited	Payment Date	Instructions sent ✓	Completed ✓
Eg: Telstra	952 55515	Monthly	Varies	25th of each month		

## Have you considered . . .

### Direct Debits

- ✓ Home Loan repayments
- ✓ Home/Mobile Phone
- ✓ Personal Loan repayments
- ✓ Electricity account
- ✓ Childcare payments
- ✓ Magazine subscriptions
- ✓ Health fund
- ✓ Gas account
- ✓ Home/Contents Insurance

- ✓ Rent payments
- ✓ School/University fees
- ✓ Finance repayments
- ✓ Donations
- ✓ Car-parking fees
- ✓ Gym memberships
- ✓ Credit Card payments
- ✓ Life, income protection Insurance
- ✓ Internet Account

### Direct Credits

- ✓ Government entitlement/benefits
- ✓ Share Dividend payments
- ✓ Investment Property rent
- ✓ Health fund

# Salary Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

## Name of Employer

## Name of Employee

## Employee's Address

To the Payroll Manager,

From  (date) I,  (name),  
 (employee number/position number),

wish to have my salary paid directly into my BankSA account as follows:

## New Account Details

BankSA

BSB No.  1  0  5 -

Account No.

Account Name

Total Salary

Selected Amount →

\$

Sincerely,



Date

dd

mm

yy

Once complete, please forward to your payroll department/officer

# Direct Credit Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

## Name of Company/Person Crediting Account

## Address

Membership No./Account No./Reference No./Customer No.

Dear Sir/Madam,

I am writing to inform you that I have changed the bank account from which I would like my \_\_\_\_\_ payment credited.

Please ensure that all payments due after  are made to the following account:  
dd mm yy

## New Account Details

BankSA

BSB No.    -

Account No.

Account Holder Name(s)/Name as it appears on card

If you have any queries, please call me. Telephone Number:

Yours faithfully,

**Account Holder Signature(s)** *(all interested parties to sign)*

X

\_\_\_\_\_

X

\_\_\_\_\_

Date

dd mm yy

Date

dd mm yy

Once complete, please forward to the company/person who is crediting your account.

# Direct Credit Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

## Name of Company/Person Crediting Account

## Address

Membership No./Account No./Reference No./Customer No.

Dear Sir/Madam,

I am writing to inform you that I have changed the bank account from which I would like my \_\_\_\_\_ payment credited.

Please ensure that all payments due after  are made to the following account:  
dd mm yy

## New Account Details

BankSA

BSB No.    -

Account No.

Account Holder Name(s)/Name as it appears on card

If you have any queries, please call me. Telephone Number:

Yours faithfully,

**Account Holder Signature(s)** *(all interested parties to sign)*

X

\_\_\_\_\_

X

\_\_\_\_\_

Date

dd mm yy

Date

dd mm yy

Once complete, please forward to the company/person who is crediting your account.

# Direct Debit Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

## Name of Company/Person Debiting Account

## Address

Membership No./Account No./Reference No./Customer No.

Dear Sir/Madam,

I am writing to inform you that I have changed the bank account from which I would like my direct debit withdrawn.

Please ensure all amounts from  are deducted from the account below:  
dd mm yy

## New Account Details

BankSA

BSB No.    -

Account No.

Credit Card                    Exp    
mm yy

Account Holder Name(s)/Name as it appears on card

If you have any queries, please call me. Telephone Number:

Yours faithfully,

**Account Holder Signature(s)** *(all interested parties to sign)*

X

\_\_\_\_\_

X

\_\_\_\_\_

Date

dd mm yy

Date

dd mm yy

Once complete, please forward to the company/person who is crediting your account.



# Direct Debit Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

**Name of Company/Person Debiting Account**

**Address**



Membership No./Account No./Reference No./Customer No.

Dear Sir/Madam,

I am writing to inform you that I have changed the bank account from which I would like my direct debit withdrawn.

Please ensure all amounts from  are deducted from the account below:  
dd mm yy

**New Account Details**

BankSA

BSB No.    -

Account No.

Credit Card                    Exp    
mm yy

Account Holder Name(s)/Name as it appears on card

If you have any queries, please call me. Telephone Number:

Yours faithfully,

**Account Holder Signature(s)** *(all interested parties to sign)*

 \_\_\_\_\_

 \_\_\_\_\_

Date   
dd mm yy

Date   
dd mm yy

Once complete, please forward to the company/person who is crediting your account.

# Account Closure Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

Name of institution where your **non-BankSA** account is held

Address of institution where your **non-BankSA** account is held

Dear Sir/Madam, please close the following account:

Account Holder Name(s)

BSB No.    -

Account No.

Credit Card                 Exp  /   
mm yy

Postal Address

Please send me a cheque for the balance of my account to:

Please credit my BankSA Account:

BSB No.  1  0  5 -

Account No.

BankSA

Yours faithfully,

Account Holder Signature(s) (all interested parties to sign)

X

X

Date

Phone Number

Phone Number

Once complete, please forward to the Financial Institution where the account you wish to close is held.



Call 13 13 76 – [banksa.com.au](https://www.banksa.com.au)