




**We Care About Making Life
Easier For You.**

Bryant Bank Switch Kit

BRYANT  **BANK**



At Bryant Bank, we realize how important it is to have a banking experience that is both convenient and easy. To do this, our Bryant Bankers deliver unbeatable service to each customer that we engage with.

As you open a new account with Bryant Bank, allow us to take a load off of your already busy schedule. We care about you and are committed to making this process easy for everyone involved.

Welcome to Bryant Bank!



Your Hometown Bank with Big Bank Benefits

Bryant Bank offers a wide range of checking and savings accounts with features that will help you make the most of your busy lifestyle. You can expect to enjoy benefits such as instant issue debit cards, control of your debit card with the MyCardRules app, free Bryant Bank Online and Mobile Banking, Mobile Check Deposit, and Mobile Wallets (Apple Pay, Samsung Pay, Google Pay, and Fitbit Pay) all while having a local banker to assist you.

Local Bankers and Personalized Service

Our Bankers put care into action each day to help you invest in your full potential. At Bryant Bank, you're greeted by name and will have the opportunity to build a lasting relationship with a group of local bankers. Outside of business hours, you'll have access to Smart ATMs with deposit capabilities, night deposit, telephone banking, online and mobile banking. Customers also enjoy enhanced account security with instant fraud text alerts.

We've taken the hassle out of moving your checking account from your old bank with step-by-step instructions and simple-to-complete forms.

1 Stop by your local Bryant Bank office to open your new checking account. We believe that one of our many banking options is sure to help empower your potential!

2 Stop using your old checking account and let the checks you have written or the transactions you have had clear. This should take approximately two weeks.

3 To set up your direct deposit, use FORM 2 and give it to your employer or the Social Security Administration. (You may also call 1-800-333-1795 or visit GoDirect.org to set up direct deposit for Social Security payments or a Bryant Banker will assist you). Be sure to include a voided Bryant Bank check (not a deposit slip) with your request. If you need a counter check, your Bryant Banker can print one upon your request.

4 Change your automatic payments. You can use FORM 3 to change any withdrawals or payments that are automatically made from your old account. Don't forget to change those payments that use your debit card number, such as an automatic payment made online. Please feel free to make as many copies of FORM 3 as needed.

5 Close your old account. Now that your checks have cleared and you've changed your automatic deposits and payments, there's just one more step. Use FORM 4 to say goodbye to your old bank. What could be easier? Please feel free to make as many copies of FORM 4 as needed.

We're here to help! If you have any questions, please:

- Call or visit your local Bryant Bank office.
- Call us at 1-855-4BRYANT (1-855-427-9268) to speak with a Bryant Banker about opening a checking account.



FORM 1 | Personal Banking Information

The following information is important to have so that we can open your account quickly and efficiently. Joint account holders are required to fill out separate forms.

Form 1

Personal Banking Switch Kit

ACCOUNT HOLDER:

Full Legal Name (as appears on identification): _____

Physical Address: _____

City: _____ State: _____ Zip: _____

County: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

County: _____

Social Security #: _____ Date of Birth: _____

Home Phone Number: _____ Work Number: _____

Mobile Number: _____ Email: _____

Valid/Current Drivers License #: _____ Issue Date: _____

State of Issuance: _____ Expiration: _____

Employer: _____

Occupation: _____

COPY OF DRIVERS LICENSE

IMPORTANT NOTE: If the address on your drivers license does not match your current physical address, two forms of address verification will be required.



FORM 2 | **Direct Deposit Change Form**

Let's get your direct deposit set up for your new Bryant Bank account! To set up your direct deposit, use FORM 2 and give it to your employer, your retirement plan, or the Social Security Administration (you may also call 1-800-333-1795 or visit [GoDirect.org](https://www.godirect.org) to set up direct deposit for Social Security payments). Be sure to include a voided Bryant Bank check (not a deposit slip) with your request. A counter check that can be provided by your Bryant Banker will also work in this situation.

Direct Deposit Change Form

WE CARE ABOUT YOUR SECURITY: Please be cautious when delivering this form via a fax or scanning by email since it includes private and personal information.

Date: _____

Company Name (where direct deposit is): _____

Address: _____

City, State, & Zip: _____

To Whom It May Concern,

I am requesting that you change my direct deposit to my Bryant Bank account. I authorize _____ to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit error to my account indicated below and authorize Bryant Bank to credit and/or debit the same to such account. This authority is to remain in full force and effect until company listed above has received notification from me of its termination and have had a reasonable opportunity to act on it.

(company/organization name)

My new account information is listed below:

Signature Date

Social Security Number/Tax ID Number

Daytime Phone Number

Bryant Bank Account Number

062206512

Bryant Bank Routing Number

**ATTACH A VOIDED CHECK FROM YOUR
NEW BRYANT BANK ACCOUNT HERE**



FORM 3

Automatic Withdrawal Change Form

It's important to remember to change your automatic payments. You can use FORM 3 to change any withdrawals or payments that are automatically made from your old account. Don't forget to change those payments that use your debit card number or your checking account number, such as an automatic payment made online. Please feel free to make as many copies of FORM 3 as needed.

Form 3

Automatic Withdrawal Change Form

Date: _____

Account Name: _____

To Whom It May Concern:

You are currently withdrawing

\$ _____ from the following account: _____

Current Bank: _____

Routing Number: _____

Account Number: _____

For _____

Reason of Payment

On _____

Date of Month

Please stop making withdrawals from this account on _____ and start making them from my new Bryant Bank account: _____
Date

Bryant Bank routing number 062206512

Bryant Bank account number _____

If you have any questions, please let me know. Thank you!

Sincerely,

Name of Account

Primary Signature

Print Name

Secondary Signature (if applicable)

Print Name

Phone Number

Address; City, State, & Zip



FORM 4 | **Close Account Form**

It is time to close your old account. Now that your checks have cleared and you've changed your automatic deposits and payments, there's just one more step. Use FORM 4 to say goodbye to your old bank. Please feel free to make as many copies of FORM 4 as needed.

We're excited for you to become a part of the Bryant Bank family!

Form 4

Close Account Form

Date: _____

Account Name: _____

Current Bank Address: _____

City, State, & Zip: _____

RE: _____
Account Number

To Whom It May Concern:

Effective _____, please close the following personal checking or savings account

_____ and send a check for the remaining balance to the address below.

If you have any questions, please let me know. Thank you!

Sincerely,

Name of Account

Primary Signature

Print Name

Secondary Signature (if applicable)

Print Name

Phone Number To Contact Me

Switch Kit Transfer Checklist

	Company/ Financial Institution	Account Number	Type of Account	Date Mailed or Contacted	Item Complete
Direct Deposit					
Direct Deposit					
Automatic Payment					
Automatic Payment					
Automatic Payment					
Automatic Payment					
Automatic Payment					
Credit Balance Transfer					
Credit Balance Transfer					
Automatic Closure					
Automatic Closure					

BRYANT BANK

Unbeatable Service. Legendary Results.SM

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