



Member FDIC

# Switch Kit

## Welcome!

To make a seamless transition - just follow the simple steps provided below. If you have any questions, during this process, please feel free to contact US. We are here to help!

You can reach us by calling our customer service center at 1-866-440-0391 or email [customerservice@ulstersavings.com](mailto:customerservice@ulstersavings.com).

## 5 Simple Steps

1. Open your new account at any Ulster Savings Bank location or online at [www.ulstersavings.com](http://www.ulstersavings.com).
2. Stop using your old checking account and let all of your outstanding checks clear.
3. Change your direct deposits by using the forms in this Switch Kit.
4. Change your automatic payments by using the form in this Switch Kit.
5. Close your old account. If you have a remaining balance after all of your checks have cleared, your old financial institution will send you a check in that amount.

## I. Closing My Account

Please complete the information below. Your signature is required to close your account. Your bank may have additional requirements.

Date \_\_\_\_\_

Financial Institution's Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

This form gives you the authorization to close account number \_\_\_\_\_ and send a check for the remaining balance to the address below.

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Co-Signer Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

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

\_\_\_\_\_

## II. Change Direct Deposit

Complete this section and give it to your employer, the Social Security Administration or your retirement plan provider to change your direct deposit to go into your new Ulster Savings Bank account.

Date \_\_\_\_\_

Company making direct deposit \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

**You are currently making a Direct Deposit to the following account:**

Existing Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

Checking Account  Savings Account

**Please start making these automatic deposits into my new account:**

**Ulster Savings Bank Routing Number: 2219-7126-4**

Checking Account  Savings Account

**Ulster Savings Bank** Account Number \_\_\_\_\_

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

The US Social Security Administration can be reached by calling 1-800-772-1213 or by visiting them online at [www.ssa.gov](http://www.ssa.gov).

### III. Change Automatic Withdrawal

Use this section to change your automatic withdrawals to come from your new **Ulster Savings Bank** account. Don't forget about those that use your old debit card number, such as automatic payments made online.

Date \_\_\_\_\_

Financial Institution's Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

I recently changed banks and opened an account at **Ulster Savings Bank**. You are currently withdrawing \$ \_\_\_\_\_ from the following account:

Existing Financial Institution \_\_\_\_\_

Routing Number \_\_\_\_\_

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

For (*payment reason*) \_\_\_\_\_ On (*date of month*) \_\_\_\_\_

Please stop making withdrawals from this account on (*Date*) \_\_\_\_\_

and start making them from my new **Ulster Savings Bank** account:

Checking Account  Savings Account

**Ulster Savings Bank Routing Number: 2219-7126-4**

**Ulster Savings Bank** Account Number \_\_\_\_\_

Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

## IV. Automatic Withdrawal/Direct Deposit Checklist

Refer to the Automatic Withdrawal/Direct Deposit checklist below to determine who needs notification that you have switched your checking account to Ulster Savings Bank.

Then be sure to complete sections II and/or III for each box you checked below and mail it to your service provider.

If you have any questions, please don't hesitate to contact Ulster Savings Bank at 866-440-0391. We are here to help you make a seamless transition to your new Ulster Savings Bank account.

### For Automatic Withdrawal / Direct Deposit

### Mark when completed or for additional notes

Mortgage

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Electricity

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Internet

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Credit Cards

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Insurance

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Loans

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Investments

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Health Clubs

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Charities

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Employer

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Cell Phone

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Telephone

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Cable

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Social Security

(1-800-772-1213 or [www.ssa.gov](http://www.ssa.gov))

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Other

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