



SWITCH KIT

Welcome to Southern Bank!

Switching your accounts to Southern Bank is easy, and this switch kit will help you make the transition as seamlessly as possible.

We're here to help you get started as you make the switch.

YOUR SWITCH KIT INCLUDES:

- Direct Deposit Change Form
- ACH Payments Change Form
- Request to Close Accounts

STEP 1 Open a new Southern Bank checking or savings account.

STEP 2 Use the forms in this switch kit to change over your direct deposit and ACH payment.

STEP 3 Ensure all transactions/automatic payments have cleared on your old account.

STEP 4 Use the account closure form to close your old account.



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(855) 452-7272
www.bankwithsouthern.com
Member FDIC

Direct Deposit Authorization Form

Use this fillable form to update your direct deposit information to your Southern Bank account. Complete and give to your employer or deposit provider. If you have any questions, please contact our Resource Center at 1-855-452-7272.

NOTIFICATION OF DIRECT DEPOSIT AUTHORIZATION CHANGE

Name:

Address:

City, State, Zip:

Phone Number:

MAIN ACCOUNT - NET PAY

Bank Name: Checking Savings

Routing #: Account #:

SECONDARY ACCOUNT - NET PAY (where applicable)

Bank Name: Checking Savings

Routing #: Account #:

Amount \$: or %:

By signing below, I authorize (company name) and Southern Bank to automatically deposit my check into the account(s) listed above. This authorization is effective as of and will remain in effect until I have filed a new authorization or until this authorization is revoked in writing by me.

Signature Date

DIRECT DEPOSIT CHECKLIST

Use this list to remember all of your direct deposits that you need to transfer. These are the most common:

- Payroll
- Retirement/Annuity
- Dividends
- Other (non SSA/SSI)

SOCIAL SECURITY DIRECT DEPOSIT

To update or begin having your social security directly deposited, use one of these methods:

- Go to GoDirect.gov to sign up online
- Call GoDirect at 800-333-1795
- Visit your local Southern Bank branch or SSA office

You may need to submit a voided check. This will allow the depositor to verify the information above. Write VOID in large letters in ink across the check, covering most lines so that nothing else can be written in on the check. One of the starter checks you received when you opened your account will be fine.

Attach voided check here.



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Automatic Withdrawal Authorization Form

Use this fillable form to update your automatic payments, deductions, or withdrawals to your Southern Bank account. Complete and give to your payee(s). If you have any questions, please contact our Resource Center at 1-855-452-7272.

NOTIFICATION OF WITHDRAWAL AUTHORIZATION CHANGE

Company Name:

Address:

City, State, Zip:

Phone Number:

Account#: Payment Amount:

Name on Account:

Please change my automatic withdrawal from the following account:

Bank Name:

Routing #: Account #:

Please make all future automatic withdrawals from the following account:

Bank Name:

Routing #: Account #:

This authorization will remain in effect until I have submitted a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature
Date

Name:

Address:

City, State, Zip:

Phone Number:

AUTOMATIC WITHDRAWAL CHECKLIST

Use this list to remember all of your automatic payments that need to be updated. These are the most common:

- Home Mortgage/Rent
- Auto Loans
- Utilities
- Insurance
- Cable/Internet
- Cell Phone
- Credit Cards
- Gym/Club Memberships
- Investments
- Subscriptions
- Charity Donations



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Request to Close Account(s)

Use this form to request closure of your old account.

To: _____

From: _____

Re: Request to Close Account(s) Date: _____

Please accept this letter as my written authorization to close the following account(s) at your financial institution. All of my transactions have cleared and I have stopped all automatic debits and credits to my account.

Please issue a check for any remaining balance and send it to my attention at the following address:

Account(s) to close:

Checking Account # _____

Authorized Signer _____

Authorized Signer _____

Savings/Money Market Account # _____

Authorized Signer _____

Authorized Signer _____

Business Debit Card _____

Authorized Signer _____

Authorized Signer _____

Business Credit Card _____

Authorized Signer _____

Authorized Signer _____

Your prompt attention to this matter will be greatly appreciated. Thank you.

