

Simple Switch Kit

Southwest National Bank wants to make the transition as simple as possible. With our simple switch kit, you will feel comfortable knowing everything has been taken care of. Our forms assure no steps are forgotten, including direct deposits and automatic payments.

- Open Your New Checking Account With Us
- Review Your Old Account For Outstanding Transactions
- Change Your Direct Deposits & Automatic Payments
- Close Your Previous Account

Download fillable forms at www.southwestnb.com

PLEASE NOTE: SOUTHWEST NATIONAL BANK CANNOT GUARANTEE THAT THESE FORMS WILL BE ACCEPTED IN EVERY INSTANCE. YOUR PREVIOUS FINANCIAL INSTITUTION AND/OR YOUR SERVICE PARTNERS MAY REQUIRE YOU TO MAKE ANY OF THESE REQUESTS IN PERSON OR ANOTHER METHOD THAN MAIL. THEY MAY ALSO REQUIRE MORE OR DIFFERENT INFORMATION THAN IS CONTAINED ON THE FORMS PROVIDED.

If you have any questions or concerns during this process, please do not hesitate to contact us:

1. Call or stop into your local Southwest National Bank branch.
2. Call us at 1-800-747-5303 to speak with one of our friendly banking specialists.

SouthWest National Bank

Open your new Southwest National Bank account

Open Online at **www.southwestnb.com** or visit any of our convenient locations and a dedicated banking specialist will happily assist you in establishing your new account with us.

Get organized

Organize your transactions that will be switched to your new Southwest National Bank account.

Transfer direct deposits

To transfer your direct deposit, send **Direct Deposit Authorization Form** to your employer and any other sources so your funds can be automatically deposited to your Southwest National Bank account. Please contact your employer's payroll department if you have questions about their process.

Transfer your automatic payments

Use **Automatic Payment Authorization Form** to request the transfer of your automatic payment(s) to your Southwest National Bank account, or to establish a new automatic payment from your new Southwest National Bank account. Please allow sufficient time for your first payments to be activated.

Close your old account

Use **Account Closing Letter** to request your previous financial institution close your account(s) and give directions on how to disburse any of your remaining funds. Make sure all of your checks and debits have cleared BEFORE you close your old account.

Download fillable forms at www.southwestnb.com



SouthWest National Bank

Transaction Checklist

Personal Account Easy Switch

Organize your Direct Deposits and Automatic Withdrawals when switching to Southwest National Bank

Helpful Tip: For reference, gather your most recent statement from your old financial institution. You may even want a couple months worth. If applicable, include statements/information for utility payments, loan payments, health club memberships, etc. you have set up with your old account.

Southwest National Bank
PO Box 1401
Wichita, KS 67201

Routing Number: 101100618
Your Checking Account Number:
Your Savings Account Number:

Direct Deposits (List all direct deposits to your account(s)

Deposit Type	Company/Institution Name	Account Number	Amount	Date
Employer Payroll				
Social Security (800-772-1213)				
Retirement/Pension Plans				
Investments/Brokerage				

Automatic Payments/Transfers (List all withdrawals from your account(s)

Withdrawal Type	Company/Institution Name	Account Number	Amount	Date
Home/auto Insurance				
Life Insurance				
Gas/Electric				
Water				
TV/Internet				
Mortgage				
Credit Card				
Car Payment				

Former Account Activity Tracking

You will want to keep track of the activity on your old account. Make sure that all checks, deposits, automatic payments, debit card transactions and ATM withdrawals have cleared before closing the account.

Reset | Send | Print | Save

Direct Deposit Authorization Form

Include a voided Southwest National Bank check with this form

Dear: _____
Company/Institution Name

My account number with your company is: _____ In the name of: _____

To Whom It May Concern,

I have recently switched financial institutions. Please stop making deposits into my old account and begin making them to my new Southwest National Bank account indicated below.

My new account information to begin using:

Bank Name: **Southwest National Account**

Routing Number: **101100618** Account Number: _____

Please discontinue using my old account information:

Old Bank Name: _____

Old Routing #: _____ Old Account #: _____

If you have any questions regarding this request, please contact me at:

Name: _____ Email: _____

Street Address: _____ Home Phone: _____

City: _____ State: _____ Zip: _____ Cell Phone: _____

Sincerely,

_____ _____
Signature Date

_____
Print Name

Reset Send Print Save

Automatic Payment Authorization Form

Include a voided Southwest National Bank check with this form

Dear: _____
Company/Institution Name

My account number with your company is: _____ In the name of: _____

To Whom It May Concern,

I have recently switched financial institutions. Please redirect my automatic payments from my old account and begin withdrawing from my new Southwest National Bank account indicated below.

Effective: ○ Immediately ○ Beginning: _____ Pay: ○ Total Amount ○ _____

My new account information to begin using:

Bank Name: **Southwest National Bank**
Routing Number: **101100618** Account Number: _____

Please discontinue using my old account information:

Old Bank Name: _____
Old Routing #: _____ Old Account #: _____

If you have any questions regarding this request, please contact me at:

Name: _____ Email: _____
Street Address: _____ Home Phone: _____
City: _____ St.: _____ Zip: _____ Cell Phone: _____

Sincerely,

_____ _____
Signature Date

_____
Print Name

Reset Send Print Save

Account Closing Notification Form

Send this letter to your previous bank as authorization to close your old accounts

Dear: _____
Former Bank Name

To Whom It May Concern,

Please accept this letter as authorization and close my account(s) listed below with your institution.

Account Type	Account Number	Account Owner Name(s)	Social Security No.
☐ Checking ☐ Savings			
☐ Checking ☐ Savings			
☐ Checking ☐ Savings			
☐ Checking ☐ Savings			
☐ Checking ☐ Savings			
☐ Checking ☐ Savings			

Please forward all remaining balance(s) along with all accrued interest (if applicable):

Bank Name: **Southwest National Bank**
PO. Box 1401
Wichita, KS 67201

Routing Number: **101100618** Account Number: _____

Or send Cashiers Check directly to me at:

Name: _____ Email: _____

Street Address: _____ Home Phone: _____

City: _____ State: _____ Zip: _____ Cell Phone: _____

_____ _____
Primary Account Owner Signature Date

_____ _____
Secondary Account Holder Signature Date

Reset Send Print Save