



MinsterBank
Bank close. Go far.

SWITCH KIT



Welcome to Minster Bank! Switching is simple—and we'll be with you every step of the way. Our Switch Kit makes it easy to move your accounts, update payments, and start enjoying all the benefits of banking close to home. Let's get started!

6 Steps to Make the Switch to Minster Bank

1. OPEN YOUR NEW ACCOUNT

Choose the Minster Bank account that's right for you—online or at any branch. You'll just need:

- ◆ Driver's license or State ID
- ◆ Previous address (if at current address less than 2 years)
- ◆ Social Security Number
- ◆ Funds to open your account

Once your account is open, sign up for Online Banking, download the Minster Bank mobile app, and enroll in services like Bill Pay, Zelle®, Mobile Wallet, and e-Statements.

2. UPDATE YOUR DIRECT DEPOSIT

Use our Direct Deposit Change Authorization Form and give it to your employer to reroute your paycheck directly into your new account.

3. CHANGE YOUR AUTOMATIC PAYMENTS

Check your old statement for automatic payments and use our handy checklist to keep track. Then, send our Automatic Payment/Withdrawal Change Authorization Form to each company so they can update your account information.

4. TRANSFER MOST OF YOUR MONEY

Move most of your balance to your new Minster Bank account, but keep enough in your old account to cover any pending checks or automatic payments.

5. STOP USING YOUR OLD ACCOUNT

Once your direct deposits and automatic payments have switched over, stop writing checks or making payments from your old account.

6. CLOSE YOUR OLD ACCOUNT

When everything has fully transitioned, use our Account Closing Request Form to close your old account and transfer the remaining funds to Minster Bank.

Ready to Switch?

All the forms you need are included in this kit. Switching banks doesn't have to be stressful—we'll make it easy. Together, we can go far!



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NMLS #403381



Automatic Payment & Direct Deposit Checklist

Use this form to organize all your automatic payments and deposits in one convenient place.

Automatic Payments

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/rent				
Auto loan 1				
Auto loan 2				
Insurance				
Credit card 1				
Credit card 2				
Gas/oil				
Electric				
Water				
TV service				
Telephone				
Cell phone				
Trash removal				
Internet provider				
Health club				
Investments				
IRA/retirement				
Charities				
Daycare				
Education				
Other				

Direct Deposits

Payment	Company	Account Number	Amount	Date of Deposit
Employee payroll				
Pension/retirement plan				
Social Security				
Investment income				
Other				

Direct Deposit Change Authorization

If you receive direct deposits, this form can be used to switch each direct deposit to Minster Bank.

Instructions:

- ◆ Verify if the organization requires a specific form for direct deposit changes.
- ◆ Fill out, print, and submit a separate form for each income source.
- ◆ To make changes to Social Security deposits, call 800.772.1213 or visit www.ssa.gov.

TO: (Company/Employer)

FROM: (Personal Information)

Name

Name

Street Address

Street Address

City, State, Zip

City, State, Zip

I have recently changed banks and need to update my direct deposit information. Please accept this letter as authorization to change my bank information for the following direct deposit:

Name

Social Security/Employer ID Number

Payment Type

Current Bank Name

Current Bank Account Number

Current ABA Bank Routing Number

Effective immediately, my new bank information is listed below:

Bank Name

Select One: Checking Savings Money Market

Account Number

Routing Number

Special Instructions

If you have questions or need additional information, please reach out at: _____

Please provide confirmation when complete. Thank you for your help with this matter.

Signature

Date



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Automatic Payment / Withdrawal Change Authorization

Use this form to transfer your automatic payments and withdrawals to your Minster Bank account. Be sure to complete, print, and submit a separate form for each organization that processes automatic withdrawals from your account.

TO: (Company/Employer)

FROM: (Personal Information)

Name

Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Customer Account Number

I have recently changed banks and need to switch my automatic debit(s) to my new account. Please accept this letter as authorization to update information for the account below:

Current Bank Name

Current Account Number

Current Bank Routing Number

Effective immediately, my new bank information is listed below:

Bank Name

Select One: Checking Savings Money Market

Account Number

Routing Number

Special Instructions

If you have questions or need additional information, please reach out at: _____

Thank you for your help with this matter.

Signature

Date



Account Closing Request

Use this form to close your account at another bank and request the remaining balance be mailed to you as a check.

Instructions:

- ◆ Fill out, print, and submit a separate form for each account.
- ◆ Ensure all checks and payments have cleared before closing your account.
- ◆ Confirm that all direct deposits have been successfully transferred to your Minster Bank account.

TO:

Current Bank Name

FROM: (Primary Account Holder)

Name

Street Address

City, State, Zip

FROM: (Secondary Account Holder)

Name

Street Address

City, State, Zip

This letter serves as my authorization and request to close my account with your institution.

Account Number

Select One: Checking Savings Money Market

Please issue a check in the amount of my full account balance, including any accrued interest, and send to my attention at the address you have on file.

If you have questions or need additional information, please reach out at: _____
Thank you for your help with this matter.

Signature

Date

Signature

Date