



## National Bank of Coxsackie **EASY-TO-SWITCH KIT**

We make it simple for you to switch your accounts to your local, hometown bank.

### *Switching is easy!*

Everything you need is in four simple steps.

#### **STEP 1**

Open your account at the National Bank of Coxsackie.

Your account number and the National Bank of Coxsackie's routing number are listed on the bottom of your starter check pack.

#### **STEP 2**

Switch your automatic and direct deposits to your new account.

Use the **Change Direct Deposits** form.

#### **STEP 3**

Switch your automatic withdrawals and payments to your new account. Use the **Change Automatic Withdrawals and Payments** form.

#### **STEP 4**

Close your old accounts at other financial institutions.

Use the **Close Accounts** form.

Contact your local branch for additional information about switching your accounts to the National Bank of Coxsackie.



# CHANGE DIRECT DEPOSITS

Date: \_\_\_\_\_

Employer/ Direct Depositor's Name: \_\_\_\_\_

Employer/ Direct Depositor's Address: \_\_\_\_\_

City, State, ZIP Code: \_\_\_\_\_

Ladies and Gentlemen:

You are currently making direct deposits on my behalf into this account:

Old financial institution: \_\_\_\_\_

Account number: \_\_\_\_\_

Routing number: \_\_\_\_\_

Please discontinue direct deposits to the above account and immediately begin direct deposits into my new account at:

National Bank of Coxsackie  
3-7 Reed Street, PO Box 400  
Coxsackie, NY 12051-0400

Routing Number: 021307054

My New Account Number: \_\_\_\_\_

If you have any questions, please contact me at (\_\_\_\_\_)\_\_\_\_\_(telephone number).

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Address

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

\_\_\_\_\_  
City, State, ZIP Code

\_\_\_\_\_  
Social Security Number

**STEP 3**

# CHANGE AUTOMATIC WITHDRAWALS AND PAYMENTS

Date: \_\_\_\_\_

Company Taking Automatic Withdrawal/ Payment: \_\_\_\_\_

Company's Address: \_\_\_\_\_

City, State, ZIP Code: \_\_\_\_\_

Ladies and Gentlemen:

You are currently withdrawing \_\_\_\_\_ dollars every \_\_\_\_\_ (when) for my \_\_\_\_\_ payment from:

Old financial institution: \_\_\_\_\_

Account number: \_\_\_\_\_

Routing number: \_\_\_\_\_

Please discontinue withdrawals from the above account and: (check one)

Commence withdrawals from my new account at:

National Bank of Coxsackie  
3-7 Reed Street, PO Box 400  
Coxsackie, NY 12051-0400

Routing Number: 021307054

My New Account Number: \_\_\_\_\_

Commence withdrawals from my new Visa debit card:

Card Number: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

I will make my payments through the National Bank of Coxsackie's bill pay service.

If you have any questions, please contact me at (\_\_\_\_\_) \_\_\_\_\_ (telephone number).

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Address

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

\_\_\_\_\_  
City, State, ZIP Code

\_\_\_\_\_  
Social Security Number

# **STEP 4** **CLOSE ACCOUNTS**

Before closing your old account, be sure that all outstanding checks and automatic payments have cleared.

Date: \_\_\_\_\_

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

Financial Institution's Address: \_\_\_\_\_

City, State, ZIP Code: \_\_\_\_\_

Ladies and Gentlemen:

Please close my account(s) with your financial institution:

• Account number: \_\_\_\_\_

Account holder(s): \_\_\_\_\_

• Account number: \_\_\_\_\_

Account holder(s): \_\_\_\_\_

Kindly send a cashier's check for the remaining balance(s) to:

National Bank of Coxsackie  
3-7 Reed Street, PO Box 400  
Coxsackie, NY 12051-0400

Routing Number: 021307054

My New Account Number: \_\_\_\_\_

If you have any questions, please contact me at (\_\_\_\_\_) \_\_\_\_\_ (telephone number).

Thank you,

\_\_\_\_\_  
Account Holder 1 Signature

\_\_\_\_\_  
Account Holder 2 Signature

\_\_\_\_\_  
Account Holder 1 Print Name

\_\_\_\_\_  
Account Holder 2 Print Name

\_\_\_\_\_  
Account Holder 1 Social Security Number

\_\_\_\_\_  
Account Holder 2 Social Security Number

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, ZIP Code

# **DON'T FORGET!**

Did you change all of your **DIRECT DEPOSITS?**

- |   |  |
|---|--|
| <input type="checkbox"/> Payroll                      | <input type="checkbox"/> Stock dividends |
| <input type="checkbox"/> Social Security              | <input type="checkbox"/> Child support   |
| <input type="checkbox"/> Tax refunds                  | <input type="checkbox"/> Disability      |
| <input type="checkbox"/> Supplemental Security Income | <input type="checkbox"/> Other deposits  |

Did you change all of your **AUTOMATIC WITHDRAWALS AND PAYMENTS?**

- |  |   |
|--|---|
| <input type="checkbox"/> Mortgage                        | <input type="checkbox"/> Internet service           |
| <input type="checkbox"/> Rent                            | <input type="checkbox"/> Credit cards               |
| <input type="checkbox"/> Utilities: water, gas, electric | <input type="checkbox"/> Insurance                  |
| <input type="checkbox"/> Loans                           | <input type="checkbox"/> Investments                |
| <input type="checkbox"/> Landline phone                  | <input type="checkbox"/> Membership dues            |
| <input type="checkbox"/> Cable/satellite                 | <input type="checkbox"/> Online bill payees         |
| <input type="checkbox"/> Cell phone                      | <input type="checkbox"/> Other payments/withdrawals |

Did you close all of your **OLD ACCOUNTS?**

Financial Institution: \_\_\_\_\_

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

Financial Institution: \_\_\_\_\_

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

Financial Institution: \_\_\_\_\_

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

Financial Institution: \_\_\_\_\_

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