Make the Switch to People First Bank.

If you are thinking about choosing a new bank, consider People First Bank. It's easy to make the switch to People First Bank.

All the forms you'll need to switch your accounts, your automatic transfers and payments, and your direct deposits to People First Bank are right here.

Here is the information we'll need from you to make the switch:

- Name(s) as listed on current accounts
- Physical address (no P.O. Boxes)
- Social Security number(s) / TIN
- Date of Birth
- Government picture ID
- Name of your current financial institution
- List of all direct deposits, automatic deposits, automatic payments and/or automatic transfers
- Your most recent bank statement
- Copies of bills that are automatically drafted from your accounts (if any).

Three simple steps to make the switch!

STEP 1: **Choose your Branch –**
Meet your Customer Service Representative and set up your new People First Bank accounts.

STEP 2: **Change your Automatic Payments and Deposits –**

Automatic Transfers
Change your automatic transfers to your new People First Bank accounts.

Direct Deposits
Change your direct deposits to your new People First Bank accounts.

Automatic Payments
STEP 3: Change automatic payments and drafts to your new People First Bank accounts.

Close your old accounts –
Close your checking and savings accounts at your former bank.
Keep track of everything you need to switch to People First Bank with our Switch Checklist

People First BANK

REQUEST AND APPROVAL TO CHANGE AUTOMATIC TRANSFER

Print and complete a copy of this form to notify any banks or companies that you are authorizing your automatic transfer (example: loan payment, insurance payment, transfer to brokerage accounts, transfers to savings accounts, etc.) to your new People First Bank account.

This form is recommended for fixed dollar amount transfers.

You are currently making the following automatic transfer on my behalf: $ _____

FROM

Name of Bank or Company _____

Account Number _____

TO

Name of Institution _____

Account Number _____

Schedule/Frequency _____

Please use this letter as my authorization to switch the transfer to
the below listed account at People First Bank
Institution People First Bank
Routing Number 064208398
Account Number _____

All other aspects of the transfer should remain the same.

Please make this change effective as of (date): _____

If you need additional information to complete this change,

I can be contacted at (phone) _____

Signature _____ Date _____

Signature _____ Date _____

People First BANK

AUTHORIZATION TO CHANGE DIRECT DEPOSIT/AUTOMATIC DEPOSITS

Print and complete a copy of this form for each depositor with whom you have arranged for direct deposit (example: payroll, dividends, royalties, etc.) to notify them that you are authorizing the direct deposit to be made to your new People First Bank account.

Please allow sufficient time for this change to be reflected.

My checking account at the following financial institution has been closed:

Name of former Financial Institution _____

Old ABA Routing Number _____

Old Account Number _____

Name(s) on Account _____

Social Security Number _____

Please establish direct deposit into my People First Bank checking account.

People First Bank Routing Number: 064208398

My New People First Bank Account Number _____

I have enclosed a deposit slip to verify my new People First Bank account number.

Signature _____ Date_____

Signature _____ Date_____

People First BANK

AUTHORIZATION TO CHANGE AUTOMATIC PAYMENT/DRAFT

Complete this form to cancel automatic payments/drafts (ex: utilities, telephone, etc.) that you make from your former bank account. Print as many copies of this form as you need and mail one to each of the companies with which you have an automatic payment/draft before your next payment is due.

*Please allow sufficient time for this change to take effect.

*This form is recommended for variable dollar amount transfers.

I have closed my checking account at:

Name of former Financial Institution _____

Old Routing Number _____

Old Account Number _____

Name(s) on Account _____

Social Security Number _____

I hereby authorize automatic payment/draft from my new checking account at

People First Bank.

Company to receive this form _____

My/our account number at this company _____

People First Bank Routing Number: 064208398

My new People First Bank Account Number _____

Signature _____ Date _____

Signature _____ Date _____

Daytime Phone Number _____

People First BANK

AUTHORIZATION TO CLOSE ACCOUNT

Complete this form and mail it to your former bank to notify them that you are closing your account and would like to receive a check for the remaining balance.

Please allow time for direct deposits or checks that may already be in process.

Print and complete a copy of this form for each checking or savings account that you have at your existing bank.

Please close my account at:

Name of former Financial Institution _____

Account Number _____

Name on Account _____

Secondary Name on Account _____

Social Security Number _____

Please send a check payable to me/us for the remaining balance in the above-described account directly to me/us at this address:

Address _____

City _____ State _____ Zip _____

Please establish direct deposit into my People First Bank checking account.

People First Bank Routing Number: 064208398

My new People First Bank Account Number _____

I have enclosed a deposit slip to verify my new People First Bank account number.

Signature _____ Date _____

Signature _____ Date _____

SWITCH CHECKLIST

To ensure a smooth transition, please take a moment to review this checklist and make sure you've covered everything you need to begin your relationship with People First Bank.

Did you...

☐ Choose your Branch location?

MY BANK INFORMATION

Branch Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

☐ Meet your Customer Service Representative and set up your new People First Bank accounts? My Customer Service Representative is _____

_____

☐ Change your automatic transfers to your new People First Bank accounts?

☐ Change your direct deposits to your new People First Bank accounts?

☐ Change your automatic payments and drafts to your new People First Bank accounts?

☐ Close your checking and savings accounts at your former bank?

Welcome to PEOPLE FIRST BANK!