



Account Switch Kit

Switching your account to Apple Bank is fast and easy. Use the convenient forms in this package to get started. To begin, follow the three easy steps below.

STEP 1. Open your new Apple Bank account.

- Please visit the branch location most convenient for you to open your account. (Visit www.applebank.com to view branch locations.)
- Please bring the following items with you:
 - Social Security Number or Tax Identification Number
 - Two forms of identification, one of which must be a photo ID, such as a current driver's license or passport
- Minimum opening deposit of \$100 to open your checking account. (Speak to an Apple banker or visit www.applebank.com to learn more about our checking accounts.)

STEP 2. Stop using your old checking account.

- Be sure to leave enough money in your old checking account to allow any outstanding checks and automatic payments to clear.
- When all outstanding items have cleared, you're ready to close your old account.
- If you have Online Banking and Bill Pay service with your old account, print your existing payee screens and use this information to set up your Apple Bank Online Bill Pay service. Please note the payee name, address, phone number and account number.

STEP 3. Complete and deliver the following forms.

- **Change Payroll Direct Deposit.** Complete this form if you have direct deposit of your pay.
- **Change Benefit Direct Deposit.** Complete this form if you have direct deposit of retirement or pension funds, Social Security payments, or military or other government benefits.
- **Change Automatic Payments.** Complete this form if you have automatic withdrawals coming out of your checking account for mortgage, auto or other loan payments; homeowner's, auto or life insurance payments; utility, phone or cable bills; or other automatic payments. Please include all providers that use your old account number or debit card number and any online automatic payment accounts.
- **Close Account.** Once all your automatic credits/debits have been changed, use this form to contact your previous financial institution to close your old account and have the outstanding balance sent to you. Be sure to destroy your unused checks and deposit slips, as well as old ATM and debit cards.

It's that easy! If you have questions during any part of this process, please contact your Apple banker or call CustomerLine at 914-902-2775.



Account Switch Kit

Authorization to Change My Payroll Direct Deposit

Please use this form to contact your employer's Human Resources Department.

Date (Month, Day and Year):

Employer Name:

Employer Address:

City:

State:

Zip:

Effective ___/___/____, please stop processing my direct deposit with:

Previous Financial Institution:

Routing # (at the bottom left of your personal check):

Account #:

Effective ___/___/____, please start using my new Apple Bank account for processing my payroll direct deposit. **If a checking account:** Enclosed is a voided check from my new account to verify account number.

Apple Bank – Routing Number 226070584

Please check one and provide account number:

Apple Checking Account #:

Apple Savings Account #:

If you have any questions about this request, please contact me during the day or evening (circle one) at the following phone number:

Signature:

Name (please print):

Address:

City:

State:

Zip:

Other Information Your Employer May Require (Social Security Number, Employee ID Number, etc.):



Account Switch Kit

Authorization to Change My Direct Deposit for Retirement, Pension, Social Security or Other Government Benefits

Please make copies of this form to contact the firm handling your retirement or pension payments, the Social Security Administration, and/or other government agency from which you receive recurring payments.

Date (Month, Day and Year):

Company or Agency Name:

Address:

City:

State:

Zip:

Effective ___/___/____, please stop processing my direct deposit with:

Previous Financial Institution:

Routing # (at the bottom left of your personal check):

Account #:

Effective ___/___/____, please start using my new Apple Bank account for processing my direct deposit.

If a checking account: Enclosed is a voided check from my new account to verify account number.

Apple Bank – Routing Number 226070584

**Please check one and
provide account number:**

Apple Checking Account #:

Apple Savings Account #:

If you have any questions about this request, please contact me during the day or evening (circle one) at the following phone number:

Signature:

Full Name (please print):

Address:

City:

State:

Zip:

Other Information That May Be Required (Social Security Number, Account Number, ID Number, etc.):



Account Switch Kit

Authorization to Change My Automatic Payment Account

Please make copies of this form to use for any service provider that makes withdrawals from your account.

- | | |
|--|---|
| <ul style="list-style-type: none"> • Mortgage/Home Equity • Auto Loan or Lease • Gas and/or Electric • Phone/Cell Phone/Cable/Internet • Credit Cards | <ul style="list-style-type: none"> • Investments • Insurance (Health, Life or Auto) • Safe Deposit Box Rental • EZ Pass • Memberships/Charitable Contributions |
|--|---|

Date (Month, Day and Year):

Name of Provider Making Automatic Withdrawal:

Address:

City:

State:

Zip:

You are currently withdrawing (please check one): Monthly Quarterly Other

\$ Amount:

For my (what payment is for):

From the following account (account or ID #):

Previous Financial Institution:

Routing # (at the bottom left of your personal check):

Account#:

Please stop making withdrawals from that account. Instead, please make withdrawals from:

Apple Bank – Routing Number 226070584

Please check one and provide account number:

Apple Checking Account #:

Apple Savings Account #:

If you have any questions about this request, please contact me during the day or evening (circle one) at the following phone number:

Signature:

Full Name (please print):

Address:

City:

State:

Zip:



Account Switch Kit

Authorization to Close My Account

Please use this form to contact your current financial institution(s) to close your checking account(s), once your outstanding checks and/or automatic payments have cleared. Please make as many copies of this form as you need. You may also use it to close a savings account.

Date (Month, Day and Year):

Financial Institution Name:

Address:

City:

State:

Zip:

Effective ___/___/____, please close the following accounts:

Checking Account #:

Savings Account #:

Please send a check to me with the remaining balance and please mail to the address below. Thank you.

Accountholder Signature:

Full Name (please print):

Address:

City:

State:

Zip:

Daytime Phone #:

Cell Phone #:

Email Address: