



# Switch Kit

Thank you for choosing to switch your banking relationship over to Community Bank. By following these simple steps we hope that we can help to make the process easier for you.

**Step 1:** Become a Community Bank Customer by completing our [new business account application](#) or [new sole proprietor account](#) application.

If you are already a Community Bank customer you can proceed to step 2.

**Step 2:** Visit any of our Branches to open your account

Be sure to bring the following with you:

- New account application if you are a new customer
- Valid Photo ID/Driver's License of all owners
- All Account Owners present to sign
- Your current bank statement if you would like one of our bankers to help you identify any of your direct deposits or payments that you will need to contact to come out of your Community Bank account.

**Step 3:** Change your direct deposit information

Contact the company and give them the bank Routing Number and your new account number.

Community Bank Routing number 091804723 Your Account Number \_\_\_\_\_

- Payroll Direct Deposit
- Social Security
- Retirement deposits
- Investments
- Dividends

You will need both your new account and old account open during the transition in order to ensure no automatic deposits or payments are missed.

## **Step 4:** Update any automatic and pre authorized bill payments to come out of your new account with Community Bank.

Contact the company and give them the bank Routing Number and your new account number.

Community Bank Routing number [091804723](#) Your Account Number \_\_\_\_\_

You will need both your new account and old account open during the transition in order to ensure no automatic deposits or payments are missed.

### Examples of payments to update

- Mortgage or Rent
- Insurance (Auto-Health-Life)
- Credit Card Payment
- Loan Payments (Car-Home-Home Equity-Student)
- Utilities
  - Electric
  - Gas
  - Water
  - Sewer
  - Cellular Service
  - Internet Provider
- Automatic Transfers between accounts
- Subscriptions
- Monthly Club Memberships
- Annual Memberships
- Taxes –(Property-Federal-State)

## **Step 5:** Close your former account

Verify that all outstanding debits-checks-and outgoing payments have cleared

Contact the financial institution to close your previous account. Not formally closing the account may result in fees being assessed by that financial institution depending on their account requirements.



**Website: [communitybankwi.com](http://communitybankwi.com)**

**Email: [info@communitybanwi.com](mailto:info@communitybanwi.com)**