



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 account application](#) included with this kit.

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

Email: info@communitybanwi.com

New Account Application-Consumers

Instructions: Fill in the application, print out and bring to your local branch to open an account.
All owners and agents of the account must be completed on this form

Ownership of Account <input type="radio"/> Individual <input type="radio"/> Joint	Type of Account-Personal <input type="radio"/> Simple Checking <input type="radio"/> Savings High Yield <input type="radio"/> High Yield Money Market <input type="radio"/> Certificate of Deposit-Term _____ <input type="radio"/> HSA or IRA
Would you like a payable on death beneficiary on this account? (Other than joint owner survivorship, Not applicable for Safe Deposit Box rental) If Yes: Beneficiary Name _____ Relationship _____	Check all additional services you may need: <input type="radio"/> Internet banking <input type="radio"/> ATM/Debit Card <input type="radio"/> Wire Services <input type="radio"/> Loans <input type="radio"/> Safe Deposit Box <input type="radio"/> Auto Transfer
Customer 1 Name (First, MI, Last) X	Customer 2 Name (First, MI, Last) X
Physical Address X	Physical Address X
Mailing Address-If different than physical X	Mailing Address- If different than physical X
Date of Birth X	Date of Birth X
SSN or Fed IIN, Passport Number, or other Identification Number X	SSN or Fed IIN, Passport Number, or other Identification Number X
Password for phone Inquiry X	Password for phone inquiry X
Occupation X	Occupation X
Phone Numbers: Cell Phone: _____ Home: _____ Work: _____	Phone Numbers: Cell Phone: _____ Home: _____ Work: _____
Email Address: X	Email Address: X
DL/ID Number: State _____ Issue date: _____ Exp date: _____	DL/ID Number: State _____ Issue date: _____ Exp date: _____

Important Information about procedures for opening a New Account: To help the government fight the funding of terrorism and money laundering activities, Federal Law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account we will ask you for your name, address, date of birth, and other information that will allow us to identify you. We may ask to see your driver's license or other identifying documents.