

*Make the Switch...  
to a Better Bank!*



**EZ** SWITCH KIT

**Premier Service Bank**

MAKES IT SO EASY TO SWITCH YOUR ACCOUNTS





## *Now You Can Switch With Ease.* **Premier Service Bank MAKES IT SO EASY!**

This kit provides a simple step-by-step process to help you make a smooth and easy transition to our bank. We provide you with the forms to close your account(s) and change your Direct Deposit(s) and automatic withdrawals. We'll be happy to assist you with any of the forms included in the switch kit.

### **Step #1: OPEN - Your New Account(s)**

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Open your Premier Service Bank account(s). Once the account(s) is opened, you have the opportunity to explore our products and services and personally experience how we deliver them with care...and give a little extra.

### **Step #2: CLOSE – Prepare to Close Your Old Account(s)**

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Immediately start using your new account(s). Make sure your old account(s) is active long enough to allow outstanding checks and automatic withdrawals to clear.

Once you're sure that your old account(s) is inactive, complete the Close Account form included in the kit and we'll be happy to do the rest! We will provide additional copies of the forms if needed.

Once your account(s) is closed at your previous bank(s), destroy your old checks, ATM/Debit cards and deposit slips.

### **Step #3: SWITCH OVER – Switch Over Your Automatic Transactions**

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Use the checklist to keep track of the companies and financial institutions that have been notified of your new Premier Service Bank account number for your automatic deposits and withdrawals.

### **Step #4: YOU'RE DONE !!!**

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**Welcome to Premier Service.** Our mission is to provide you with the best package of services – a combination of personal attention and tailored banking solutions – that makes a clear difference. The right size, the right services, and the right solutions!



# Close Account

To Whom it May Concern:

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

Please close my account \_\_\_\_\_ (account number), and send a check for the remaining balance to me at the address listed below.

OR

Please close my account(s) and forward the remaining balance to be deposited at Premier Service Bank (see information below)

**Premier Service Bank**

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

Premier Service Bank  
3637 Arlington Ave., Ste. B  
Riverside, CA 92506  
Attention: Central Operations

If you have any questions about this request, please contact me during the

DAY     EVENING (select one) at

( \_\_\_\_\_ ) \_\_\_\_\_ (phone number).

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

## Change Automatic Payments/Withdrawals

\_\_\_\_\_  
Date Name of Company That Makes Automatic Withdrawal

\_\_\_\_\_  
Address City State Zip

To Whom it May Concern:

You are currently withdrawing \$ \_\_\_\_\_ for my \_\_\_\_\_ (what payment is for).  
My customer # (or other identifying #) for the above withdrawal is \_\_\_\_\_ and withdrawals  
are made \_\_\_\_\_ (when) from the following account:

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

Routing Number: \_\_\_\_\_

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

Account Type: \_\_\_\_\_

**Effective \_\_\_\_\_ (date), please stop making withdrawals from the above  
mentioned account.**

**Effective \_\_\_\_\_ (date), begin withdrawing from:**

**Premier Service Bank**

Routing Number: **1222-43240**

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

If you have any questions about this request, please contact me during the

DAY  EVENING (select one) at ( \_\_\_\_\_ ) \_\_\_\_\_ (phone number).

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

# Change Direct Deposit

\_\_\_\_\_  
Date Employee/Depositor's Name

\_\_\_\_\_  
Address City State Zip

To Whom it May Concern:

You are currently depositing  MY ENTIRE PAYCHECK  PART OF MY PAYCHECK to the following account:

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

Routing Number: \_\_\_\_\_

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

Account Type: \_\_\_\_\_

**Effective \_\_\_\_\_ (date), please stop making deposits to the above mentioned account.**

**Effective \_\_\_\_\_ (date), begin sending them to:**

**Premier Service Bank**

Routing Number: **1222-43240**

Please check all that apply:

Savings Account No. \_\_\_\_\_ \$ \_\_\_\_\_ (amount)

Checking Account No. \_\_\_\_\_ \$ \_\_\_\_\_ (amount)\*

Money Market Account No. \_\_\_\_\_ \$ \_\_\_\_\_ (amount)\*

\*(I have attached a voided check for your reference)

If you have any questions about this request, please contact me during the

DAY  EVENING (select one) at ( \_\_\_\_\_ ) \_\_\_\_\_ (phone number).

Thank you.

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City State Zip

\_\_\_\_\_  
Other Information Your Employer May Need (SSN, Employee ID#, etc.)

# Switch List

Use this checklist to quickly identify all vendors who currently have access to your account(s).

## AUTOMATIC DEPOSITS

- Payroll**  
Contact the HR Department where you work.  
Please include a voided check.  
Effective Date of Change \_\_\_\_\_
- Social Security**  
Contact the Social Security Administration at 800-772-1213.  
Effective Date of Change \_\_\_\_\_
- Transfers from Other Bank Accounts**  
Effective Date of Change \_\_\_\_\_
- Brokerage Deposits**  
Effective Date of Change \_\_\_\_\_
- Other**  
Effective Date of Change \_\_\_\_\_

## UTILITIES AUTOMATIC PAYMENT

- Gas**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Electric**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Water/Sewer**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Local/Long Distance Telephone Service**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Cellular Telephone Service**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Internet Service**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Cable or Satellite TV**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Garbage**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Other**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Other**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_

## OTHER PAYMENTS

- Loans** (e.g. car, home equity, student loan, credit card)  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Mortgage**  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Account Transfers to Other**  
Bank Accounts  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Insurance** (e.g. life, health, auto, home)  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_  
Account No. \_\_\_\_\_  
Effective Date of Change \_\_\_\_\_
- Brokerage – Automatic Investments**  
Effective Date of Change \_\_\_\_\_
- Other**  
Effective Date of Change \_\_\_\_\_
- Other**  
Effective Date of Change \_\_\_\_\_