



# 'Make the Switch' Kit



Do you still think all banks are alike?  
Maybe you think it's too much trouble to open a new account at a different bank?  
Well, it's certainly NO trouble with Islanders Bank!  
When you open a new account, our Customer Service Representatives will give you all the individual attention you need- that's just the one benefit of banking local.  
With a little help from you and the convenient resources in this Make the Switch kit, we will help you to easily make the transition to Island Banking.

Community Banking Since 1981  
[www.IslandersBank.com](http://www.IslandersBank.com)





No matter what your needs may be – we have an account for you.

Our array of accounts offers you flexibility, savings and convenience to meet every customer's individual needs.

For more information on these accounts, speak with one of our Islanders Bank Customer Service Representatives.

No matter which accounts you choose, you'll enjoy the personal care and service at any Branch location, complete with convenient hours.

### **The features you want – and deserve on every account.**

In addition to superior customer service, our full line of personal checking accounts provides the best values including:

- Free Visa Debit Card
- Free Islanders Bank Online Banking and Bill Pay
- Free Islanders Bank-By-Phone
- Free ATM transactions at participating *MoneyPass* ATM's.
- And More...



*Eco-Checking*

*Islands Connection Checking*

*Islands Best Checking*



### **With our Islands Connection Checking Account receive:**

- Low opening balance requirement
- 50% off first box of Islands Checks
- Waived Monthly Service Charge fee with a minimum monthly transfer to Connection Savings.

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## **We want you to build your relationship with us!**

We're making it easy to switch your accounts to Islanders Bank. Just review and complete the Account Switch forms.

Then, come to one of our branches to open your new accounts.

You can make the move to Island Banking – in just five simple steps!

### **1. Visit an Islanders Bank Branch to open your new accounts.**

- Meet with a Customer Service Representative to review your completed forms and choose the account that is right for you.
- Set up Islanders Bank Online Banking & Bill Pay while you wait.

### **2. Balance your old account – and STOP using it!**

- Make sure enough funds are available in your account to cover any automatic payments that may yet need to be withdrawn.

### **3. Switch your direct deposits**

Complete the enclosed Account Switch Form



Give copies to your employer, retirement plan and/or Social Security Administration office. The fastest way to change the direct deposit of your Social Security Benefits is to call: 1-800-772-1213

\*Have your social security Number available \_\_\_\_ - \_\_\_\_ - \_\_\_\_.  
Amount of last deposit \$\_\_\_\_\_



Veteran's Benefits: 1-800-827-1000

### **4. Redirect your automatic and online payments**

- Complete the Account Switch form to change any automatic withdrawals or payment services.

### **5. Close your old accounts**

- Complete the enclosed Account Closing form to instruct your old bank how and where to send a check for any remaining balance.

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## Account Balance Worksheet



Start by balancing your existing account. Use the worksheet below to balance your checkbook register beginning with the current checking account balance shown on your most recent statement.

Be as accurate as possible when completing the form. After you have completed this worksheet and set up your new accounts, you no longer need to use your old account! Note: All pending transactions must be cleared before the account is closed.

1. Current balance on your checking statement. \$ \_\_\_\_\_  
Current Statement Balance
  
2. List deposits that do not appear on your statement.
 

Date	Amount	
_____	\$ _____	+ \$ _____ Total of Step 2
_____	\$ _____	
_____	\$ _____	
  
3. Subtotal by adding Steps 1 and 2. = \$ \_\_\_\_\_  
Total Steps 1 & 2
  
4. List outstanding checks, transfers or withdrawals that do not appear on your statement.
 

_____	_____	- \$ _____ Total Step 4
_____	_____	
  
5. Subtract Step 4 from Step 3  
This amount should match your checkbook register = \$ \_\_\_\_\_  
Current Account Balance

Retain this worksheet for your records.

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## **'Make the Switch' Account Form**

For Automatic Payments and Direct Deposits

Complete a copy of this form to redirect each of your automatic payments and direct deposits. Mail each form, along with a voided check from your new account, to the appropriate business or merchant authorized to have access to your account. If you currently receive a federal benefit via direct deposit, please contact a Customer Service Representative to ensure a quick and accurate switch of these funds to your new account.

To: \_\_\_\_\_  
Company Name

From: \_\_\_\_\_  
Customer Name

\_\_\_\_\_  
Company Address

\_\_\_\_\_  
Customer Address

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
City, State, Zip Code

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

Please redirect my:  Direct Deposit

Automatic Payments

Effective:  Immediately

Beginning \_\_\_\_/\_\_\_\_/\_\_\_\_

### **My new account information is listed below:**

\_\_\_\_\_  
125107820  
ABA Routing Number

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

Checking  Savings  Money Market

\_\_\_\_\_  
Signature

***Attach a VOIDED Check from your new account to this page.***

\_\_\_\_\_  
Date

\_\_\_\_\_  
Daytime Phone Number

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## Authorization to Close Account

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Date \_\_\_\_\_ Financial Institution \_\_\_\_\_

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Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

To Whom It May Concern:

Please close the following account(s):

\_\_\_\_\_  Checking  Savings  Money Market  Other  
Account Number

\_\_\_\_\_  Checking  Savings  Money Market  Other  
Account Number

\_\_\_\_\_  Checking  Savings  Money Market  Other  
Account Number

\_\_\_\_\_  Checking  Savings  Money Market  Other  
Account Number

Please send any remaining funds:

The address shown below

\_\_\_\_\_  
Name

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Mailing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

---

Primary Account Holder Signature \_\_\_\_\_ Date \_\_\_\_\_

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Secondary Account Holder Signature \_\_\_\_\_ Date \_\_\_\_\_

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