

# Quick Switch to Evergreen Bank Group



Thank you for choosing Evergreen Bank Group for your banking needs. The forms here are everything you need to assist you in switching your current account. Just follow the steps below and your switch will be complete.

**STEP 1:** Open your new Evergreen Bank Group checking account with one of our Universal Bankers.

**STEP 2:** We recommend that you leave your old account open for a period of time to ensure that direct deposits and all automatic payments have successfully switched to your new account with Evergreen Bank Group.

**STEP 3:** Complete the Automatic Payment / Direct Deposit checklist below. We have also included Authorization forms for both to help your current creditors and employers with the process. (Signatures needed)

**STEP 4:** To authorize or transfer direct deposit of a government check, Social Security or Veteran's Administration Compensation, use Form 1199A. Contact a Universal Banker for more information.

**STEP 5:** Verify that all automatic payments/deposits have converted correctly and close your account.

That's it! It's that easy to switch. Our Universal Bankers are all able to assist you through this process.

You can minimize your automatic debit forms by enrolling in our FREE Online Banking and Bill Pay services.

Evergreen Bank Group  
1515 W 22nd St., Suite 100  
Oak Brook, IL 60523  
(888) 505-BANK

Automatic Payment Checklist				
Payment	Company	Account #	Amount (\$)	Payment Date
Mortgage/Rent				
Home Equity				
Car Loan 1				
Car Loan 2				
Electric				
Gas				
Telephone				
Cell Phone				
Cable				
Water				
Internet				
Credit Card 1				
Credit Card 2				
Credit Card 3				
Investment				
IRA/Retirement				
Other				

Direct Deposit Checklist				
Payment	Company	Account #	Amount (\$)	Payment Date
Employee Payroll 1				
Employee Payroll 2				
Social Security 1				
Social Security 2				
Pension				
Retirement Account				
Investment Income				
Other				

**Account Change Form**  
**For Automatic Payments and Direct Deposits**

TO:

FROM:

\_\_\_\_\_  
Merchant or Business Name

\_\_\_\_\_  
Customer Name

\_\_\_\_\_  
Merchant or Business Address

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

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

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

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

\_\_\_\_\_  
Employee ID Number/Department (if applicable)

To Whom It May Concern: Please redirect my automatic payment/direct deposit for the above account to my new Evergreen Bank Group account as instructed below.

Please change my: (Circle one)  
Direct Deposit      Automatic Payment

Account Type: (Circle one)  
Checking      Savings

Effective:  
Immediately      Beginning \_\_\_\_/\_\_\_\_/\_\_\_\_

Evergreen Bank Group account information:

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

071925981  
\_\_\_\_\_  
Routing Number

If you have any questions about this request, please contact me at: \_\_\_\_\_  
Phone Number

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Please attach a VOIDED Check from your Evergreen Bank Group account.



# Account Closing Form

TO:

FROM:

\_\_\_\_\_  
Bank Name

\_\_\_\_\_  
Customer Name

\_\_\_\_\_  
Bank Address

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

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

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

To Whom It May Concern:

Please close my account described below, effective on today's date, as indicated and send a check for the remaining balance to the address above.

\_\_\_\_\_  
Name(s) on Account

\_\_\_\_\_  
Name(s) on Account

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

\_\_\_\_\_  
Type of Account

\_\_\_\_\_  
\$\$ Balance in Account

If you have any questions about this request, please contact me at: \_\_\_\_\_

Phone Number

Sincerely,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

