

# Quick Switch to Evergreen Private Bank



Thank you for choosing Evergreen Private Bank for your banking needs. Enclosed you will find everything you need to assist you in switching your current account. Just follow the simple steps below and your switch will be complete.

**STEP 1:** Open your new Evergreen Private Bank checking account with one of our Customer Service Officers.

**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 Private Bank.

**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 an Executive Banker for more information.

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

That's it! It's that easy to switch. Our Executive 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 Private Bank  
 1515 W 22nd St., Suite 100  
 Oak Brook, IL 60523  
 (888) 505-BANK

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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.

Note: This form is valid for accounts at Evergreen Community Bank and Evergreen Private Bank



Member FDIC

# 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

Note: This form is valid for accounts at Evergreen Community Bank and Evergreen Private Bank



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