



## Switch Assist Checklist

At Kitsap Bank we want to make switching over to your local hometown bank as simple as possible. For your convenience we have provided a checklist of five easy-to-use steps and the forms necessary for us to assist you in making a seamless switch.

### Step 1: Open an account with Kitsap Bank.

- Complete the Client Profile Form.
- Visit your local Kitsap Bank Branch to open an account.

### Step 2: Change your payroll or direct deposit.

- Old account number or recent bank statement
- New account number/routing number (provided by Kitsap Bank)
- Complete Direct Deposit Transfer Request Form (provided by Kitsap Bank or your Employer).
- If have Direct Deposit from Social Security, complete government form 1199A (provided by Kitsap Bank).
- Provide copies of the Direct Deposit Transfer Request Form to your employer, pension plan administrator, etc.

### Step 3: Set-up Kitsap Bank Online Banking and Bill Pay.

- Go to [www.kitsapbank.com](http://www.kitsapbank.com) to sign up for Kitsap Bank Online Banking.
- Once you are signed up for Online Banking, complete the registration for FREE Bill Payment services.
- Set-up all bills to be paid.
- Cancel your bill payments and/or automatic payments with prior institution/vendor.

### Step 4: Cancel and/or Change your automatic payments or withdrawals.

- Recent statement from vendor
- New account number/routing number (checking, savings, etc. from Kitsap Bank)
- Complete Automatic Payment/Withdrawal Request Form (provided by Kitsap Bank).
- Provide a copy of the Automatic Payment/Withdrawal Request Form. If you choose not to cancel your automatic payment/withdrawal, along with the form include a cancelled check from your new Kitsap Bank account.

### Step 5: Close your old account and transfer any remaining funds.

- Old account number or recent bank statement
- Account Closing/Transfer Request Form (provided by Kitsap Bank)
- New account number/routing number (provided by Kitsap Bank)
- Ensure all checks have cleared on your old account.
- Provide the Account Closing/Transfer Request Form to your old financial institution.