

# SWITCH KIT

all it takes is

three  
**EASY**  
steps

Isn't it time you started enjoying all the benefits of banking with Champlain National Bank? If you think switching banks is tedious and complicated - think again! We make it easy. This Switch Kit outlines the steps you need to take and even includes a few easy forms to help you with the process.

Isn't it time you made the switch?

one

## 1. Open your new Champlain National Bank checking account.

To open a checking account visit any Champlain National Bank office. Fill out the enclosed Account Opening form to expedite the process.

two

## 2. Move your transactions to your new account.

### Change Your Direct Deposit to Champlain National Bank.

For payroll Direct Deposit, fill out the enclosed Payroll Direct Deposit Change form and give it to your employer's payroll office.

To change your Social Security Direct Deposit, call the Social Security Administration at 1-800-772-1213 and tell them that you want your Direct Deposit to go to Champlain National Bank. Be prepared to provide your CNB account number and routing number (021310407).

### Switch Your Automatic Withdrawals to Champlain National Bank.

Use the enclosed Automatic Withdrawal Change form to contact any organization that you have authorized to make automatic withdrawals from your account and let them know that you have switched to Champlain National Bank.


three

## 3. Close your old account.

Follow the enclosed Account Closure Checklist to complete your switch to Champlain National Bank and start enjoying your new benefits with us.

Champlain 298-4114    Crown Point 597-3322    Elizabethtown 873-6347    Keene 576-9515    Lake Placid 523-7070    Plattsburgh 562-1785/561-6000    Westport 962-8216    Willsboro 963-4201

Member FDIC 10/02/06

 Champlain National Bank

 Equal Housing Lender

one

# Account Opening Form

Select the checking account you would like to open along with any other listed products and services you are interested in:

- Champlain Privilege
- Champlain Benefit
- Champlain Free
- Champlain Image
- ATM Card
- Debit Card
- NetTeller® Internet Banking
- NetTeller® Bill Payment
- In Touch Telephone Banking
- SWEEP Account
- Statement Savings
- Money Market
- Super Money Market
- Money Market Select
- Champlain Benefit Money Market
- Champlain Privilege Money Market
- Christmas Club
- Certificate of Deposit
- Personal Loan
- Auto Loan
- Home Equity Loan
- Home Equity Line of Credit
- Home Improvement Loan
- Mortgage Loan
- Construction Loan

Complete the following form to open your new account\*:

**PERSONAL INFORMATION (please print)**

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ Social Security Number \_\_\_\_\_

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

Previous address if at current for less than six months: \_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Employer: \_\_\_\_\_ Phone/Address: \_\_\_\_\_

\_\_\_\_\_ Driver's License #: \_\_\_\_\_ State: \_\_\_\_\_

Have you lived in your present state for the last five years?  Yes  No If no indicate state lived in: \_\_\_\_\_

**JOINT APPLICANT INFORMATION (please print)**

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ Social Security Number \_\_\_\_\_

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

Previous address if at current for less than six months: \_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_ Employer: \_\_\_\_\_ Phone/Address: \_\_\_\_\_

\_\_\_\_\_ Driver's License #: \_\_\_\_\_ State: \_\_\_\_\_

Have you lived in your present state for the last five years?  Yes  No If no indicate state lived in: \_\_\_\_\_

\* Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account.

two

# Payroll/Direct Deposit Change Form

Fill out this form and attach a voided check from your new account. Give this to your payroll clerk for direct deposit of your paycheck.

## EMPLOYEE INFORMATION (please print)

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_ Social Security Number \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_ Fax Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

## DIRECT DEPOSIT INFORMATION (please print)

Depository Bank Name: Champlain National Bank Phone Number: (518) 963-4201  
Address: 3900 NYS Route 22 City: Willsboro State: NY Zip: 12996  
New Account Number: \_\_\_\_\_  Checking  Savings  
New Routing Number: 021310407

I authorize \_\_\_\_\_ to automatically deposit my net wage payment each pay period to the account indicated above.  
(Company Name)

Employee Signature: X Date: \_\_\_\_\_

two

# Automatic Withdrawal Change Form

Fill out this form and attach a voided check from your new account. Send this form to each company you have automatic payment/withdrawal with.

## PERSONAL INFORMATION (please print)

First Name: \_\_\_\_\_ Middle Initial: \_\_\_\_\_ Last Name: \_\_\_\_\_  
Address: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Day Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_ Fax Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Company Name: \_\_\_\_\_ Customer Account Number with the Company: \_\_\_\_\_

## AUTOMATIC WITHDRAWAL INFORMATION (please print)

Depository Bank Name: Champlain National Bank Phone Number: (518) 963-4201  
Address: 3900 NYS Route 22 City: Willsboro State: NY Zip: 12996  
New Account Number: \_\_\_\_\_  Checking  Savings  
New Routing Number: 021310407

I authorize changing my direct withdrawals/payments to the account indicated above.

Employee Signature: X Date: \_\_\_\_\_

three

# Account Closure Checklist

Before closing your existing account, review this list and make sure the following have been completed:

- All checks and electronic debits have cleared the existing account.
- All automatic withdrawals and deposits have been switched to your new account at Champlain National Bank.
- Destroy remaining checks, debit cards and ATM Cards.
- Notify your existing bank. (For your convenience you may fill out and send the notice below to your existing bank.)

To Whom it May Concern:

Please accept this letter as authorization to close my account with your institution. Please forward all remaining funds on deposit to:

Champlain National Bank  
3900 NYS Route 22  
P.O. Box 130  
Willsboro, NY 12996

Please advise Champlain National Bank to deposit the funds to my account

Account Number: \_\_\_\_\_  Checking  Savings

Routing Number: 021310407

Your assistance in this matter is greatly appreciated.

Sincerely,

Print Name: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_