

SWITCH KIT

Getting Started

Making the switch!

You can make the switch to *Citizens Bank Minnesota* in four easy steps. Everything is provided in this Switch Kit. We are excited to welcome you to *Citizens* and Deliver the Ultimate Experience!

1

Open your new account.

Apply online in minutes at www.citizensmn.bank or visit your local branch to open your new *Citizens Bank Minnesota* account(s).

Direct Deposit Checklist:

Use this list to remember all your direct deposits you need to transfer. These are the most common direct deposits.

- ☐ Payroll
- ☐ Investments
- ☐ Retirement Plans
- ☐ Social Security

2

Switch your direct deposits.

If you have any direct deposits, use the Direct Deposit Authorization form to seamlessly switch them to *Citizens Bank Minnesota*.

Automatic Withdrawal Checklist:

These are some of the most commonly used automatic payments.

- ☐ Home Mortgage
- ☐ Auto Loans
- ☐ Utilities
- ☐ Insurance
- ☐ Cable/Internet
- ☐ Gym/Club Memberships
- ☐ Credit Cards
- ☐ Investments
- ☐ Subscriptions
- ☐ Charity Donations

3

Switch your automatic withdrawals.

If you have any automatic transactions, use the Automatic Withdrawal Authorization form to seamlessly switch them to *Citizens Bank Minnesota*.

4

Close your old account.

Now you're ready to switch. Simply fill out the Account Closure Authorization form to close your old account. Any remaining account balance will be transferred to *Citizens Bank Minnesota*.



DIRECT DEPOSIT AUTHORIZATION

You can use your keyboard to fill out this form online and print it once completed, or you can print the form and complete it by hand. Use one form for each direct deposit.

Notification of Direct Deposit Authorization Change

Company or Employer: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Employee ID: _____
(if applicable)

Effective immediately, I authorize (name of depositor) _____
to automatically deposit funds into the account below.

Place an X next to your desired option.

☐ Net amount to **Citizens Bank Minnesota** CHECKING
Account # _____ Routing #091901192

☐ Net amount to **Citizens Bank Minnesota** SAVINGS
Account # _____ Routing #091901192

Your Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Signature: _____ Date: _____

This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.



AUTOMATIC WITHDRAWAL AUTHORIZATION

You can use your keyboard to fill out this form online and print it once completed, or you can print the form and complete it by hand. Use one form for each automatic withdrawal.

Notification of Withdrawal Authorization Change

Name of Company: _____

Account Number: _____

Payment Amount: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Please change my automatic withdrawal from the following account:

Former Financial Institution: _____

Account # _____ Routing # _____

Please make all future automatic withdrawals from the following:

Citizens Bank Minnesota: _____

Account # _____ Routing # 091901192

Your Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Signature: _____ Date: _____

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.



ACCOUNT CLOSURE AUTHORIZATION

You can use your keyboard to fill out this form online and print it once completed, or you can print the form and complete it by hand. You may request the remaining balance from your old account(s) to be sent by check either to your new *Citizens* location or directly to your home address. Be sure to verify any outstanding items have cleared your old account.

Notification of Account Closure Authorization

To Whom It May Concern:

Former Financial Institution: _____

Address: _____

City, State, Zip: _____

Please close my account:

Account Number: _____

Please send the remaining balance to:

Place an X next to your desired option.

☐ Forward a check to *Citizens Bank Minnesota, 105 North Minnesota Street, New Ulm, MN 56073*
Attn: Client Services to deposit to my new account. In the memo please include
Deposit to Account #.

☐ Please forward me a check to my address listed below.

Your Name: _____

Address: _____

City, State, Zip: _____

Phone Number: _____

Primary Signature _____ Date: _____

Joint Signature: _____

By signing this form, I/We authorize the above financial institution to close the account above.



Congratulations!

We can't wait to Deliver
the Ultimate Experience.

Welcome to
Citizens Bank Minnesota!