

Kirkwood BANK & TRUST SWITCHKIT

Make the switch without the stress.



▶ OPEN YOUR NEW KIRKWOOD BANK & TRUST ACCOUNT

Open at ANY Kirkwood Bank & Trust location, or online at www.kirkwoodbank.com/personal-banking/checking-savings/.

▶ TRANSFER YOUR DIRECT DEPOSITS

Send the **Direct Deposit Authorization** form to your employer to set up or switch direct deposit to your new account.

▶ UPDATE YOUR AUTOMATIC PAYMENTS SCHEDULE

Use the **Automatic Payment Authorization** form to update all payments that are automatically drafted from your account.

▶ CLOSE YOUR OLD ACCOUNT

Use the **Account Closing Letter** to close your old account and direct any remaining funds.

Kirkwood Bank & Trust provides these forms as a convenience to assist with account transitions. We cannot guarantee acceptance, processing timelines, or actions taken by other financial institutions, employers, or service providers.

WHY CHOOSE US

Since 1975, we have aspired to help each individual, each family and each business achieve their dreams.

Together, we build lasting relationships that enrich lives through extraordinary service from extraordinary people.

FOUR LOCATIONS TO SERVE YOU

BISMARCK

- > 2911 NORTH 14TH ST
- > 122 EAST MAIN AVE
- > 905 TACOMA AVE

DICKINSON

- > 221 1ST AVE W





SWITCH KIT CHECKLIST

Gather your latest statements from your previous financial institution, along with any account information tied to automatic payments like utilities, loans, subscriptions, or gym memberships.

Continue monitoring your old account and wait until all checks, deposits, automatic payments, debit card purchases, and ATM transactions have fully cleared before closing the account.



DIRECT DEPOSITS	COMPANY	PHONE/WEBSITE	DATE NOTIFIED
☐ PAYROLL			
☐ SOCIAL SECURITY			
☐ PENSION/RETIREMENT			
☐ OTHER			
☐ OTHER			

AUTOMATIC PAYMENTS	COMPANY	PHONE/WEBSITE	DATE NOTIFIED
☐ AUTO INSURANCE			
☐ AUTO LOANS/LEASES			
☐ CABLE/SATELLITE			
☐ CELL PHONE			
☐ CHARITIES			
☐ CHILD CARE			
☐ CREDIT CARD			
☐ CREDIT CARD			
☐ CREDIT CARD			
☐ EDUCATION			
☐ ELECTRIC			
☐ GARBAGE			
☐ GYM MEMBERSHIP			
☐ HEALTH CLUB			
☐ HEAT (GAS/OIL)			
☐ HOME/RENT INSURANCE			
☐ INTERNET			
☐ INVESTMENTS			
☐ IRA/RETIREMENT			
☐ LIFE INSURANCE			
☐ MORTGAGE/RENT			
☐ PERSONAL LOAN			
☐ PET INSURANCE			
☐ TELEPHONE			
☐ STREAMING			
☐ WATER/SEWER			
☐ OTHER			
☐ OTHER			
☐ OTHER			
☐ OTHER			



DIRECT DEPOSIT AUTHORIZATION

To switch your direct deposit, submit this form to your employer along with any other payment sources so funds can be deposited directly into your Kirkwood Bank & Trust account.

If you have questions about setup timing or requirements, contact your employer's payroll department.

For Social Security deposits, call the Social Security Administration at (800) 333-1795 or enroll online at ssa.gov/deposit.

Attention: (Enter the company you want deposits directed from)

Name

Address

City

State

Zip Code

From: (Enter your personal information here)

Customer Name

Customer Address

City

State

Zip Code

Social Security Number (if required)

Phone

To Whom It May Concern,

I have recently switched financial institutions. Please stop making deposits into my old account and begin making them into

New Account Information: (Enter your Kirkwood Bank & Trust information here)

Kirkwood Bank & Trust Routing Number

091310592

Account Number

☐ Checking

☐ Savings

Account Number

☐ Checking

☐ Savings

Signature

Date

Deposit: ☐ Total ☐ Amount of \$ _____ into Checking account listed above.

Deposit: ☐ Total ☐ Amount of \$ _____ into Savings account listed above.



AUTOMATIC PAYMENT AUTHORIZATION



Use this form to transfer automatic payments to your Kirkwood Bank & Trust account or set up new automatic payments from your new account.

Please allow sufficient time for your first payments to be activated. A voided check may be required.

Attention: *(Enter the company you want deposits directed to)*

Name

Address

City

State

Zip Code

From: *(Enter your personal information here)*

Customer Name

Customer Address

City

State

Zip Code

Social Security Number (if required)

Phone

To Whom It May Concern,

I have recently switched financial institutions. Please redirect my automatic payments from my old account and begin withdrawing from my new Kirkwood Bank & Trust account indicated below.

Effective: ☐ Immediately ☐ Beginning ____/____/____

Pay: ☐ Total Amount ☐ \$

New Account Information: *(Enter your Kirkwood Bank & Trust information here)*

Kirkwood Bank & Trust Routing Number

091310592

Account Number

☐ Checking

☐ Savings

Signature

Date



ACCOUNT CLOSING LETTER

Use this form to request that your previous financial institution close your account(s) and provide instructions for transferring any remaining funds. Before closing the account, check for any applicable account closure fees and confirm that all checks, debit transactions, and automatic payments have cleared.

Attention: *(Enter financial institution where closing account)*

Name

Address

City

State

Zip Code

To Whom It May Concern,

Please accept this letter as authorization and close my accounts listed below with your institution. Please issue a cashier's check in my name for the remaining balance(s) along with all accrued interest (if applicable).

ACCOUNT TYPE

ACCOUNT NUMBER

ACCOUNT OWNER NAME(S)

Please send all closing balances to: *(Enter your personal information here)*

Name

Address

City

State

Zip Code

Phone Number

Primary Account Owner Signature

Date

Secondary Account Owner Signature

Date