



Switch Kit

Step One: Open your new Dogwood State Bank account

- Simply fill out the **Dogwood Bank Account Form**. This form is a quick & easy way to gather the information you will need to open your new account(s) with Dogwood State Bank.
- Bring your completed form to a Dogwood State Bank location along with proper identification: Driver's License or Picture ID and Social Security Card.

Step Two: Transfer your direct deposits

- You will need to notify any company that sends direct deposits to your account.
- First fill out the **Authorization to Change Automatic Payment** for any direct deposits you wish to be transferred to your new Dogwood State Bank account.
- Then, send the completed form to your employer's Human Resource department, or another company handling your retirement or pension payments.
- If you receive a direct deposit from the Social Security Administration, go to their website, www.ssa.gov/deposit/howtosign.htm, or call 1-800-772-1213 in order to access the proper forms.

Step Three: Transfer your automatic payments

- Use the **Authorization to Change Automatic Payment** form for each automatic payment you wish to be transferred to your new Dogwood State Bank account.
- You also have the option to cancel your Automatic Payments and use our Online Banking with Bill Pay instead. It's the convenient, easy way to track all your payments and to make sure all your bills are paid on time.

Step Four: Close your old account

- The **Authorization to Close My Deposit Account** form should be completed for each account you wish to close and mailed to your previous financial institution.
- Make sure that all checks have cleared and automatic payments and direct deposits have been switched to your new Dogwood State Bank account.
- Once they receive this form they will follow your instructions to close the appropriate account(s).
- Destroy all old checks, deposit slips and ATM cards associated with the old account.



Bring your completed forms to any location today so we can customize an account plan that works best for you!

Step One: New Dogwood State Bank Checking/Savings Account Form

Please Check one:

Individual Account

Joint Account

Primary Account Holder Information

Joint Account Holder Information

Name

Name

Street Address

Street Address

City, State, Zip

City, State, Zip

Mailing Address (if different)

Mailing Address (if different)

Email Address

Email Address

Home Phone

Home Phone

Work Phone

Work Phone

Cell Phone

Cell Phone

Social Security Number

Social Security Number

Driver's License Number

Driver's License Number

State Exp. Date

State Exp. Date



Date of Birth

Date of Birth

Mother's Maiden Name

Mother's Maiden Name

Employer

Employer

Occupation

Occupation

Signature

Signature

Step Two: Authorization to Change Direct Deposit

Company Name

Company Address

City, State

Zip

RE: Switching My Direct Deposit

I have recently changed banks and would like to have my transactions with your company changed to my new account. Please discontinue transactions from my old account and begin using my new Dogwood StateBank.

I have enclosed a voided check for your reference.

Name

Social Security Number

Street Address

City

State

Zip

Contact Telephone Number

Previous Financial Institution Information:

Name of Financial Institution

Address

City

State

Zip

Account Number



New Financial Institution Information:

Dogwood State Bank
5401 Six Forks Road, Suite 100
Raleigh, NC 27609

Routing Number: 053112466

Checking Account Savings Account

_____	_____
Effective Date	Account Number
_____	_____
Print Name	Print Name Secondary Authorized Signature
_____	_____
Signature Secondary	Authorized Signature
_____	_____
Date	Date

Step Three: Authorization to Change Automatic Payment

Company Name

Company Address

City, State

Zip

RE: Switching My Automatic Payment

I have recently changed banks and would like to have my transactions with your company changed to my new account. Please discontinue transactions from my old account and begin using my new Dogwood State Bank Account. **I have enclosed a voided check for your reference.**

Name

Social Security Number

Street Address

City

State

Zip

Contact Telephone Number

Previous Financial Institution Information:

Name of Financial Institution Address



City State Zip

Account Number

New Financial Institution Information:

Dogwood State Bank
5401 Six Forks Road, Suite
100 Raleigh, NC 27609

Routing Number: 053112466

Checking Account Savings Account

Effective Date Account Number

Print Name Print Name Secondary Authorized Signature

Signature Secondary Authorized Signature

Date Date

Step Four: Authorization to Close My Deposit Account

Previous Financial Institution Name

Previous Financial Institution Address City, State Zip

RE: Close My Account(s) Listed Below:

I have recently changed banks and would like you to close the following account(s) listed below immediately:

Primary Account Holder's Name Social Security Number

Joint Account Holder's Name (if applicable) Social Security Number

Account Number Account Number

Account Number Account Number



Address

City

State

Zip

Please send remaining funds to me at the address above or

Send the remaining funds to my new financial institution:

Dogwood State Bank
5401 Six Forks Road, Suite
100 Raleigh, NC 27609

Routing Number: 053112466

Checking Account Savings Account

Effective Date

For Deposit to this Account Number

Print Name

Print Joint Account Holder Name

Signature

Joint Account Holder Signature

Date

Date

