



# NORTH SHORE BANK

*The Bank of You*

## Steps to switching to your new bank

North Shore Bank's switch kit will help you quickly and easily switch to your new account with us. Our checklist is a great reference tool to keep you organized through the process.

### 1. Direct Deposit Change Requests

**Switch all direct deposits you have by completing the Direct Deposit form. This may include:**

- Your employer
- Government Deposit (Social Security, pension, retirement)
- Brokerage Deposits (dividends, interest)
- Transfers from other financial institution accounts (savings, checking & money market)

### 2. Switch Automatic payments, debit card payments and Online bill payees

Make sure to switch all automatic payments/withdrawals you may have by contacting the company you are paying, and give them your new account information.

**North Shore Bank Account #: \_\_\_\_\_ North Shore Bank Routing #: 275071356**

#### Utilities

- Gas
- Electric
- Phone Service
- Water
- Cable/Satellite
- Trash
- Pest Control
- Yard Maintenance
- Other

#### Other Payments

- Loans (Car, home equity, credit cards)
- Mortgages
- Brokerage
- Account Transfer
- Insurance (home, auto, renters)
- Internet Service
- Cellular Service
- Child Support or court issued payments
- Other

### 3. Balance and discontinue use of your old checking account

Leave enough money to cover any outstanding checks, debit/ATM transactions and scheduled payments/withdrawals that you have not yet switched.

### 4. Closure and Notification of Account Change

Once all outstanding payments and deposits have cleared your old account, and your first deposit has been deposited in your new account at North Shore bank, fill out the Account Closing form and instruct your bank to send any remaining balance(s) to your new account with North Shore Bank.

### 5. Don't forget to destroy the following, North Shore Bank does offer complimentary secure shredding if you are interested.

- Old Checks
- ATM Cards
- Debit Cards
- Deposit Slips

The Bank of You is about personal choice. Your schedule. Your obligations. For Questions please contact your branch or our customer service department at 877.672.2265 (Monday-Friday 8:30am- 7:00pm, Saturdays 9:00am-3:00pm & Sundays 10:00am-1:00pm)