



RIVERBANK

We Bring Banking to You

PERSONAL SWITCH KIT

Thank you for choosing RiverBank! Enclosed you will find a complete and easy to use guide for switching your bank accounts from your current financial institution to RiverBank. And to make the transition smooth, we will assist you through each of the following four easy steps:

Step 1: Open your RiverBank accounts. Our Relationship Bankers will help you select the best account and banking services, tailoring our solutions to your individual needs. We will also help you set up your Online Banking, Bill Pay, and Web Statements.

Step 2: Change your automatic deposits, payments, & transfers.

We are happy to assist in changing all automatic transactions to your new accounts. This can be easily done with the Automatic Payment or Direct Deposit Switch Form provided in this packet.

Step 3: Stop using your old account. Leave the account open until all direct deposits and automatic payments have been changed to RiverBank and all outstanding checks have cleared.

Step 4: Close your old account. Complete the enclosed Account Closure Form once automatic transactions have changed to RiverBank and all outstanding checks have cleared the old account.

It's that easy! With the help of RiverBank's well trained staff we can make the transition a smooth and easy process. Before you know it, you'll have switched to RiverBank, a bank dedicated to delivering the highest levels of customer service.

Anytime we can be of assistance, please call. We're here to work for you.

Welcome to the Family and
Thank you for choosing RiverBank!





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Products and Services		
<p><u>Account Type</u></p> <p><input type="checkbox"/> Checking <input type="checkbox"/> Home Equity Line of Credit</p> <p><input type="checkbox"/> Savings <input type="checkbox"/> Car/Boat and/or RV Loan</p> <p><input type="checkbox"/> Money Market <input type="checkbox"/> Line of Credit</p> <p><input type="checkbox"/> CD _____term</p> <p><input type="checkbox"/> IRA _____term</p>	<p><u>Services</u></p> <p><input checked="" type="checkbox"/> Online Banking and Bill Pay <i>(Included)</i></p> <p><input checked="" type="checkbox"/> Web Statement(s) <i>(Included)</i></p> <p><input checked="" type="checkbox"/> Debit Card <i>(Included)</i></p> <p><input type="checkbox"/> Credit Card</p> <p><input type="checkbox"/> Other _____</p>	
Authorized Signers	Signer #1	Signer #2
Name		
Existing Customer(s) <input type="checkbox"/> Yes (If existing customer - completion of remainder of section not required)		
Social Security #		
ID Details Issued By: ID Number: Issue Date: Expiration Date:		
Mother's Maiden Name		
Date of Birth		
Place of Birth		
Home Address		
E-Mail Addresses Primary: Secondary:		
Phone Home: Cell:		
If more than two signers on the account, please submit a second form with the additional signer information.		



FDIC



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Payment/Transfer Checklist

Tip: Review a recent account statement from your former account to identify payments and transfers.

Direct Deposit Checklist

Direct Deposit	Company	Account Number	Amount	Date of Payment	Switch Verified
Employee Payroll					

Payment or Transfer	Company	Account Number	Amount	Date of Payment	Switch Verified
Auto Loan/Lease					
Cable/Satellite TV					
Cell Phone/Tablets					
Charities					
Credit Cards					
Daycare					
Insurance (auto, home, life, medical, etc.)					
Internet Provider					
Investments					
IRA/Retirement					
Memberships (health club, auto, other)					
Mortgage/ Rent					
Telephone					
Utilities					
Other					
Investment Income					
Pension/Retirement					
Social Security*					
Other					

**Tip: The fastest way to change Social Security direct deposits is to call the Social Security Administration 1-800-772-1213. Have your social security number and amount of last deposit.*



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Use this form to redirect your automatic payment or direct deposit to your new RiverBank account.

Company Name: _____

Company Address: _____

To Whom It May Concern:

I have recently changed financial institutions, and have opened a new account with RiverBank. My information is as follows:

Name: _____ Phone Number: _____

Address: _____

Account Number with your Company: _____

Please redirect my: Direct Deposit Automatic Payment

Effective: Immediately Beginning __/__/__

My new account information is as follows: Checking Savings Money Market

RiverBank Account Number: _____

RiverBank ABA Routing Number: **125108816**

RiverBank Contact Information: 202 E. Spokane Falls Blvd. Suite 201
Spokane, WA 99202
(509) 744-6900

Authorized Signature

Date

Attach a VOIDED check from your new account to this form.



Financial Institution: _____

Mailing Address: _____

To Whom It May Concern:

Please accept this letter as authorization to close the following account(s) in the name of:

Name: _____

Account # _____ Checking Savings Money Market Other

Account # _____ Checking Savings Money Market Other

Account # _____ Checking Savings Money Market Other

Please issue a cashier's check made payable to myself and mail it to my new financial institution:

RiverBank
Attn: Client Services
202 E. Spokane Falls Blvd. Suite 201
Spokane, WA 99202

Thank you for your assistance in this matter.

Authorized Signature 1 Printed Name Date

Authorized Signature 2 (if needed) Printed Name Date

Mailing Address City State Zip Phone

If you have any questions regarding this request, or if the letter is not sufficient to make this change, please contact RiverBank Client Services at (509) 744-6900.