



IT'S EASY TO MAKE THE SWITCH

BankSouth Switch Kit

BankSouth[®]

BANKING · MORTGAGE

844-706-2265 | www.banksouth.com

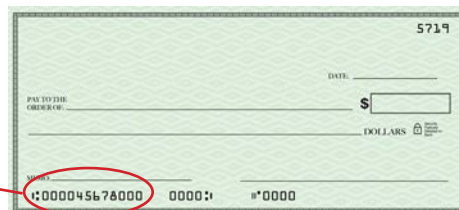


1. Change your Direct Deposit

Change your direct deposit with your employer.

Contact your employer or payer to switch direct deposit to your new account. You'll need your account number and routing number. Some companies also require a voided check. Don't forget to transfer employee expense reimbursements.

BankSouth Routing Number 061112364



Frequently used numbers:

- Social Security (SSA): 1-800-772-1213 | 1-800-325-0778 TTY
- Supplement Security (SSI): www.socialsecurity.gov
- Civil Service Retirement: 1-888-767-6738 | 1-800-878-5707 TTY | www.servicesonline.opm.gov
- Veteran Compensation and Pension 1-877-838-2778 | 1-800-829-4833 TTY | www.va.gov



2. Review monthly bank statements

Check for additional pre-authorized payments or automatic deposits including investment accounts and any other linked account such as Bill Pay items. Update all automated and pre-authorized bill payments.

Common pre-authorized bill payments include:

- **Mortgage or Rent**
- **Utilities:** electricity, water, phone, cable, internet, etc.
- **Taxes:** property, etc.
- **Insurance:** home, auto, life, etc.
- **Debts:** home equity, student loans, car loans, etc.
- **Other:** memberships, subscriptions, donations, etc.

For your use only to check pre-authorized payments on your old account.

Bill Type	Payee/Biller's Name	Mailing Address	Account Number
Mortgage/Rent			
Utilities <i>(Electric, Internet, Cable, etc.)</i>			
Taxes <i>(Property, etc.)</i>			
Insurance <i>(Auto, Life, Health, etc.)</i>			
Debts <i>(Home Equity, Credit Card, Student Loans, etc.)</i>			
Other <i>(Club Memberships, Netflix, Amazon, etc.)</i>			



3. Review old account

Make sure all checks you have written have cleared and online payments have posted. If you are using Online Banking to pay your bills, review the companies listed as Payees to make sure no payments are missed. Use your most recent bank statement to make sure any pending items have cleared.

Account Type	Account Number		
SIMPLE CHECKING	XXXX0000	Enclosures 4	
Beginning balance on February 28, 2019		\$	4,000
Total Deposits and Credits: 3		+	2,513
Total Checks and Debits: 55		-	3,700
Cycle Service Charge		-	0
Ending Balance on March 27, 2019		\$	2,813
Account Transactions			
Date	Descriptions	DEBITS	CREDITS
02/28	Grocery	78.23	
03/03	ATM	40.00	
03/15	Payroll		2100.00
03/17	Bill Payment	152.31	



4. Close Old Account

Once all deposits and debits are successfully coming in and out of your new BankSouth account, contact your previous bank on how to close your account and have the remaining funds sent to you or transferred to your BankSouth account. Fees may apply for incoming transfers.

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If you ran a bank, you'd run it like this.



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