

MAKE THE SWITCH CHECKLIST

Moving all your accounts to FNB has never been easier! Simply refer to the following guide to make your switch easy and convenient. For assistance, please contact any of our team members at our ten convenient locations. We're here to help every step of the way!



First for You

Member FDIC  Equal Housing Lender

Scottsboro • Bridgeport • Henagar • Morgan City • Pisgah • Section • Skyline • Woodville

- To **close an account and transfer** any remaining funds, you will need:
 - Recent bank statement with your old account number(s)
 - New FNB account number(s)
 - FNB routing number: 062202147
 - Form #1** - Account Closing Notification *(provided by FNB)*
 - Follow up to ensure all checks have cleared on your old account
 - Double check maturity dates if transferring a Certificate of Deposit in order to avoid possible penalties

- To **change your payroll or direct deposit**, you will need:
 - Recent bank statement with your old account number(s)
 - New FNB account number(s)
 - FNB routing number: 062202147
 - Form #2** - Direct Deposit Request *(provided by FNB)*

- To **change your Social Security Direct Deposit**, you will need:
 - New FNB account number(s)
 - FNB routing number: 062202147
 - Visit <http://www.ssa.gov/deposit/howtosign.htm> or call 1-800-772-1213 to change your direct deposit

- To **change your automatic payment or withdrawal**, you will need:
 - Recent statement from vendor
 - New FNB account number(s)
 - FNB routing number: 062202147
 - Form #3** - Automatic Payment Request *(provided by FNB)*
 - You will need to complete a separate form for each vendor that debits money from your account

- To **move your online payments and/or set up FNB Bill Pay**, you will need:
 - Recent statement from vendors
 - Form #4** - FNB Bill Pay Checklist *(provided by FNB)*

- To discuss **transferring an existing loan**, you will need:
 - Recent loan statement with loan account and balance remaining
 - Form #5** - Loan Transfer Worksheet *(provided by FNB)*

- To **transfer a 401k** (or other retirement account), you will need:
 - Recent account statement
 - Contact information for your employer or former employer
 - New FNB account number(s)