

The No-Glitch Switch Kit

Let's make switching easy.



Southern Heritage Bank



shbnet.com | 318-561-2227

Alexandria Hwy 28 West - Alexandria Jackson St. - Ball - Harrisonburg - Jena - Jonesville - Olla - Pineville - Tullos



Southern Heritage Bank



INSTRUCTIONS

Southern Heritage Bank can show you how easy it is to switch banks! Everyone looks for a hassle free way of moving current personal or business accounts, now the switch is simple with the pages enclosed. With a new account from Southern Heritage Bank, you'll have all you need to transfer direct deposits, automatic withdrawals, and social security benefits from your previous bank(s). Follow the **No Glitch Switch Kit** to financial freedom!

Step 1. Start by opening your new account at any of our nine SHB locations.
You will need your account number and bank routing numbers for the next steps.

Step 2. Stop using your old checking account(s).
Keep your old checking account(s) open until your direct deposits and automatic payments take effect and until ALL outstanding checks clear.

Step 3. Change or sign up for Direct Deposit.
Use the following Direct Deposit Enrollment Form to inform your employer or other organizations that you have a new Southern Heritage Bank account. Fill out the form using the account and bank routing numbers from your new Southern Heritage Bank account. If your employer has their own official direct deposit form bring it in and we can assist you to fill out the correct information.

Direct Deposit of Social Security or Government Checks:

The fastest way to change the direct deposit is to call GO DIRECT at 1 (800) 333-1795 or contact a Southern Heritage Bank customer service counselor for a copy of the Direct Deposit form for Federal Benefit Payments.

Step 4. Change any Automatic Payments.
If you have any monthly payments, such as utility or loan payments, automatically deducted from your account, you can use the following Automatic Change Request to inform these companies of your new account information.

Step 5. Close your old account.
Once your checks have cleared and your automatic payments have been changed to your new account, fill out the attached form to inform your former bank that you wish to close your account.



Southern Heritage Bank



Direct Deposit Enrollment

☐

New Request

☐

Change Request

Use this form to notify your employer (or any other non-governmental organization that regularly sends a payment to you) that you want the proceeds deposited directly into the Southern Heritage Bank accounts specified below.

Name	Social Security Number
Address	
City, State, Zip code	

I hereby authorize (company/organization) _____, hereinafter called "ORIGINATOR", to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit error to my accounts(s) indicated below and the depository institution named below, hereinafter called "DEPOSITORY", to credit and /or debit the same to such account.

Primary Account

Depository Name SOUTHERN HERITAGE BANK	Account Number Checking <input type="checkbox"/> Savings <input type="checkbox"/>
Routing Number 1 1 1 1 0 2 0 4 6	Amount to Deposit Net Pay \$ _____

If the ORIGINATOR allows direct deposit to more than one account, I elect to have part of my proceeds put into the following account:

Optional Secondary Account

Depository Name SOUTHERN HERITAGE BANK	Account Number Checking <input type="checkbox"/> Savings <input type="checkbox"/>
Routing Number 1 1 1 1 0 2 0 4 6	Amount to Deposit Net Pay \$ _____

This authority is to remain in full force and effect until ORIGINATOR has received written notification from me of its termination in such time and in such manner as to afford ORIGINATOR and DEPOSITORY a reasonable opportunity to act on it.

Signature _____

Date _____



Southern Heritage Bank



Existing Account Closing Form

To whom it may concern:

Please close my account described below effective ____/____/____.

Owner or Business Name
Account Number
Type of Account

☐ No disbursement of this account is necessary

OR

☐ Prepare a cashier's check for the balance of my account, payable to the business name listed on the account.

☐ Please include my Social Security Number/TIN _____

☐ Mail the check to the following address: _____

If you have any questions, please contact: _____ at _____

Customer Signature

Date

Signature (Joint Owner)

Date



Automatic Payment Change Request

Do you have automatic payments from your checking account?

If you do, you'll want to notify these organizations to begin deducting the payments from your new Southern Heritage Bank checking account.

Complete the form below, detach and include it in an envelope with a voided check from your new Southern Heritage Bank account. Mail it to the appropriate companies or organizations you have authorized to make withdrawals from your account.

While most companies accept this form, there may be some that require you to complete their own change request form.

Please feel free to make additional copies of this form as needed.

Automatic Payment Change Request

To (Payee Name)	
Payee Address	
Account Number (Insert Your Account Number With the Payee)	
Your Name	
Your Address	
I have opened a new account at Southern Heritage Bank. Please change your records so that my electronic payments to you are deducted from my new account: Checking <input type="checkbox"/> Savings <input type="checkbox"/>	
Southern Heritage Bank Routing Number 1 1 1 1 0 2 0 4 6	Southern Heritage Bank Account Number (7 digits)

Signature

Date

Attach voided check here:

Date:_____

This letter is to inform you that effective as of _____ I or we would like to close the account(s) listed below. If there are any other items, forms or issues that I must attend to in this matter please contact me/us at the number provided.

Thank you for your prompt attention to this request.

Sincerely,

Checking #_____

Savings #_____

Certificate of Deposit #_____

Other Accounts #_____

My/Our Contact information:

Mailing Address_____

City_____ State_____ Zip Code_____

Phone number (day)_____