

Switch to Crest Savings Bank

Better banking for you!



Changing banks can be a big decision and feel overwhelming. That's why Crest Savings Bank has created a Switch Kit to guide you step-by-step throughout the process. We like to keep things simple and convenient for our customers. As you make the transition to Crest Savings Bank our knowledgeable and friendly staff will be happy to assist you. After you've identified the Direct Deposits from your previous bank statements, use the Direct Deposit Request to notify the depositor of your new bank information.

1 Determine Direct Deposit Payments:

Private Sector Payments

- Payroll Direct Deposit
- Retirement / Pension Plan
- Interest Income
- Dividends
- Pay Pal
- Venmo
- Zelle
- Other _____
- Other _____
- Other _____
- Other _____

Government Payments

- Social Security
- Federal Salary / Military Civilian Pay
- VA Compensation or Pension
- Supplemental Security Income
- Railroad Retirement
- Civil Service Retirement
- Military Active
- Military Retirement
- Military Survivor
- Other _____
- Other _____

2 Before Sending the Direct Deposit Request:

- Check with your employer or source of income to make sure no other forms are required. For Social Security direct deposit, call the Social Security Administration at 1-800-772-1213 or go to www.ssa.gov/deposit/howtosign.htm.
- Use the enclosed form to establish your direct deposit at Crest Savings Bank by providing it to your employer/source of income
- Maintain the account at your previous bank until you have confirmed that your Direct Deposit(s) have been switched to your Crest Savings Bank account.

3 After sending the Direct Deposit Request:

- Confirm with your employer/source of income that forms were received.
- Monitor your account through Crest Savings Bank's mobile banking or online at www.crestsavings.bank.



PERSONAL & BUSINESS
DEPOSITS | LOANS | WEALTH MANAGEMENT



Change Payroll Direct Deposit

Date

Employer/Depositor's Name

Street Address

City, State, Zip

To Whom It May Concern:

You are currently depositing MY ENTIRE PAYCHECK/PART OF MY PAYCHECK (circle one) to the following account:

Old Bank: _____

Old Bank Routing Number: _____

Old Account Number: _____

Please stop making deposits to that account and instead send them to:

Financial Institution Name: Crest Savings Bank

Bank Routing Number: 231271501

Account Number: _____

If you have any questions about this request, please contact me during the DAY/EVENING (circle one) at _____ (phone number).

Thank you.

Sincerely,

Signature

Name (please print)

Street Address

City, State, Zip

Other Information your Employer May Need (SSN, Employee ID#)



NMLS#
472651



Banking is *what we do* • Community is *who we are*
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Change Direct Deposit

Date

Depositor's Name

Street Address

City, State, Zip

To Whom It May Concern:

You are currently depositing _____ to the following account:

Old Bank: _____

Old Bank Routing Number: _____

Old Account Number: _____

Please stop making deposits to that account and instead send them to:

Financial Institution Name: Crest Savings Bank

Bank Routing Number: 231271501

Account Number: _____

If you have any questions about this request, please contact me during the DAY/EVENING (circle one) at

_____ (phone number).

Thank you.

Sincerely,

Signature

Name (please print)

Street Address

City, State, Zip

Other Information your Employer May Need (SSN, Account #)



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