

# First National Bank Banking Switch Kit (Fillable Form)

Use this form to organize your switch to First National Bank. Fill in the fields below and keep it for your records. If you have questions, contact your local First National Bank branch.



## 1) Customer Information

Full Name Phone Number

Email Address Mailing Address

## 2) New First National Bank Account Details

Account Type      Checking      Savings      Business

Routing Number Account Number

## 3) Direct Deposit Updates

Employer / Provider Name Payroll / HR Contact

Expected Start Date (MM/DD/YYYY) Deposit Amount (optional)

## 4) Automatic Payments Checklist

List recurring payments to update (examples: utilities, subscriptions, insurance, loans).

Merchant	Amount	Frequency	Due Date	Notes
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## 5) Previous Bank Information (Optional)

Previous Bank Name Customer Service Phone

Routing Number Account # (last 4 digits)

## 6) Confirmation

Notes: Keep your previous account open until you confirm all direct deposits and automatic payments have successfully moved. Once confirmed, you may transfer any remaining balance and close your previous account.

Signature

Date (MM/DD/YYYY)