



## Switch Kit – New Account Information

Complete the following information to switch your checking account to **National Bank & Trust**. It's as easy as 1-2-3!

**Individual Account**

**Joint Account**

\_\_\_\_\_  
Name of Primary Account Holder

\_\_\_\_\_  
Name of Joint Account Holder (If applicable)

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
Street Address (If different)

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
City, State, Zip (If different)

\_\_\_\_\_  
Mailing Address (If different)

\_\_\_\_\_  
Mailing Address (If different)

\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Work Phone

\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Work Phone

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Email Address

### **Primary Account Holder Information**

### **Joint Account Holder Information**

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Driver's License Number

\_\_\_\_\_  
Expiration Date

\_\_\_\_\_  
Driver's License Number

\_\_\_\_\_  
Expiration Date

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Mother's Maiden Name

\_\_\_\_\_  
Mother's Maiden Name

\_\_\_\_\_  
Employer

\_\_\_\_\_  
Employer

### **I am interested in the following accounts and products:**

Checking    Savings    CD    IRA    Loan    Safe Deposit Box

NBT Online Banking with FREE account access and transfer capabilities

24-hour Telebanking    Overdraft Privileges    ATM or Debit Card    E-Statements

*Please note that Primary and Joint Account Holders will need to sign an official account form in person at **National Bank & Trust** before the account can be opened. For your own account security, we will also need to photocopy your driver's license(s), or other form of ID, and Social Security Card(s) so we can have it on file to accurately identify you in the future. (The purpose of this questionnaire is to begin the application process. All applications are subject to approval.)*

7/24/2006





## **Deposit & Payment Checklist**

To make the process easier, we have provided the following checklist to make sure all of your direct deposits and automatic payments get redirected to your new **National Bank & Trust** account.

### **Direct Deposits**

- Payroll Direct Deposits
- Government Deposits
- Brokerage Deposits
- Transfers From Other Bank Accounts
- Child Support
- Other Court Issued Deposits
- Other Deposits

### **Utility Payments**

- Gas
- Electric
- Local/Long Distance Telephone Services
- Cellular Phone Service
- Water
- Cable or Satellite TV
- Other

### **Other Payments**

- Insurance
- Internet Service
- Loans
- Mortgages
- Auto Loans
- Other Loans
- Account Transfers To Other Bank Accounts
- Child Support or Court Issued Payments

7/18/2005





**Automatic Payment Change Form**

Complete this form for each company or organization with whom you have arranged for automatic payment. Once completed, mail the form(s) directly to the company or organization.

I \_\_\_\_\_ have closed my checking account with  
(Your Name)

\_\_\_\_\_ effective \_\_\_\_\_.  
(Current Bank) (Date)

I hereby authorize my automatic withdrawal in the amount of \$ \_\_\_\_\_ to be changed from my current checking account # \_\_\_\_\_ at \_\_\_\_\_ to my new **National Bank & Trust** account as listed below.

Checking Account # \_\_\_\_\_

ABA Routing # \_\_\_\_\_ 113104534 \_\_\_\_\_

Effective Date \_\_\_\_\_

Amount to be withdrawn: \$ \_\_\_\_\_

Date of withdrawal: \_\_\_\_\_

If you have any questions or if there is a penalty or fee, please contact me at:

(\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Thank you for your attention to this matter,

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Joint Account Holder Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**Attach a New National Bank & Trust Voided Check Here**





**Direct Deposit Change Form**

Complete this form and provide it to your employer's Human Resource or Payroll Department.

I \_\_\_\_\_ have closed my checking account with  
(Your Name)

\_\_\_\_\_ effective \_\_\_\_\_  
(Current Bank) (Date)

I hereby authorize my my direct deposit to be changed from my current checking account # \_\_\_\_\_ at \_\_\_\_\_ to my new **National Bank & Trust** account as listed below.

Checking Account # \_\_\_\_\_

Amount to be deposited: \_\_\_\_\_

Savings Account # \_\_\_\_\_

Amount to be deposited: \_\_\_\_\_

ABA Routing # \_\_\_\_\_ 113104534 \_\_\_\_\_

Effective Date \_\_\_\_\_

If you have any questions, please contact me at: (\_\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_

Thank you for your attention to this matter,

\_\_\_\_\_  
Customer Signature

\_\_\_\_\_  
Date

**Attach a New National Bank & Trust Voided Check Here**



**Account Closing Request**

To: \_\_\_\_\_

From: Primary Account Holder \_\_\_\_\_

Social Security Number \_\_\_\_\_

Secondary Acct. Holder \_\_\_\_\_

Mailing Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Please close the following account(s) with your institution:

Account Type	Account #	Send Payment at Once	Defer Payment Until Close of Interest Period

Pay to the Order of: **National Bank & Trust** F/B/O \_\_\_\_\_

Together with all interest or dividends that may have become due on above listed accounts.

Forward Funds to: **National Bank & Trust**

P.O. Box 310

La Grange, TX 78945

Primary Account Holder Signature: \_\_\_\_\_

Secondary Account Holder Signature: \_\_\_\_\_

Date: \_\_\_\_\_

