



SWITCH KIT

▶ We're proud to have you as The Bank of Princeton customer and will do everything we can to make the process as easy as possible and make you glad you switched!

CHECKLIST

Switching to The Bank of Princeton has never been easier. Simply follow these steps:

1. **Open your TBoP account.** It's easy to open your account at The Bank of Princeton office location nearest you.
2. **Remember to stop using your previous checking account.** Keep enough funds to cover your automatic payments and outstanding checks.
3. **Identify all your direct deposits and automatic payments.** Use the Switch Kit Tracking Form. Your current bank statements will be a great resource to identify all the companies involved.
4. **Transfer direct deposits to TBoP.**
You will need the following:
 - a. Employer or deposit initiator's name and address
 - b. TBoP account number
 - c. TBoP ACH routing/transit numberUse this information to complete the direct deposit form and send it to the company that makes the direct deposit into your account. We have provided a blank Direct Deposit - Change of Instruction form for your use.
5. **Transfer automatic payments, debits(withdraws) toTBoP.**
You need the following:
 - a. Copy of your latest statement with your billing information
 - b. TBoP account number
 - c. TBoP ACH routing/transit numberUse this information to complete the Automatic Payments/ Transfers form and send it to the appropriate billing address.
6. **Closing your old bank account(s):**
 - a. Make sure all checks and debits have cleared.
 - b. Leave enough funds in your account(s) to cover any automatic payments that may need to be withdrawn.
 - c. Double check maturity dates of account(s) in order to avoid possible penalties.Close your account by completing the Request to Close Account form we have provided. Mail the signed form to your former financial institution.

Q&A

Questions and Answers

- Q.** If I have direct deposit or automatic payments, is it hard to get everything switched over?
- A.** We make the process as simple for you as possible by providing easy-to-use forms to send to the bank or other companies involved.
- Q.** How long does the process take to get everything switched over?
- A.** The amount of time will vary depending on the policy/process of the business(es) that handles the direct deposit or automatic payments. It may take a month or two before all your checks clear from your old account and the automatic deposits/payments are finalized.
- Q.** Can I call my old bank to close my account today?
- A.** Your previous bank will want to make sure all your checks have cleared and your automatic deposits/payments are switched before they close your account.

SWITCH KIT TRACKING FORM

Thank you for choosing The Bank of Princeton! This form will help you track the status of switching your automatic payments and deposits to your new The Bank of Princeton account.



Helpful Tip: Can't remember all the businesses that need to be notified about switching your direct deposit or automatic payments/transfers? Your current bank statement is a good source of information. (Don't forget any automatic transactions that are made on a schedule other than monthly.)

New Account Information

The Bank of Princeton Account Number _____

The Bank of Princeton Routing Number **031207940** _____

(found on the bottom left of your checks - just before your account number)

Direct Deposits

Company Name/Address	Date Letter/ Form Mailed	Status
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Automatic Payments

Company Name/Address	Date Letter/ Form Mailed	Status
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Before you close your old account , make sure the direct deposits and automatic payments are going to/coming from your new The Bank of Princeton account and all your outstanding checks have cleared.

Direct Deposit – Change of Instruction

TO:

Company
Name

Address

City
State, Zip

FROM:

Customer
Name

Address

City
State, Zip

Recently, I selected a new primary bank/financial institution. Please send my Direct Deposit transactions to The Bank of Princeton, effective immediately. Attached is a voided check from my account at The Bank of Princeton to insure accuracy in processing this request. Thank you for adjusting your records to reflect this change.

Social Security Number

Signature X

Date

The Bank of Princeton Account #

Daytime Phone Number

Helpful hint: Be sure to check with the companies involved to make sure they will accept this form. Some require you to fill out a form of their own.

The Bank of Princeton Routing Number **031207940**

Remember to attach a **VOIDED** check from your new The Bank of Princeton account for accuracy in changing transactions.



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Automatic Payments/Transfers – Change of Instruction

TO: Company Name _____

FROM: Customer Name _____

Address _____

Address _____

City
State, Zip _____

City
State, Zip _____

Recently, I selected a new primary bank/financial institution. Please redirect my automatic payment/transfer to The Bank of Princeton, effective immediately. Attached is a voided check from my account at The Bank of Princeton to insure accuracy in processing this request. Thank you for adjusting your records to reflect this change.

The Bank of Princeton Routing Number **031207940**

Billing Account # _____

Signature X _____ Date _____

The Bank of Princeton Account # _____

Daytime Phone Number _____

Remember to attach a **VOIDED** check from your new The Bank of Princeton account for accuracy in changing transactions.



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Request to Close Account

TO:Name of
Bank

Address

City
State, Zip

Please close my account as listed below:Name(s) on
the Account

Account #

Type of
Account

 Joint Account (if applicable)**Please forward any remaining funds to me:**

Name

Address

City
State, Zip

If you have any questions, please contact me at the following number:

Phone

Thank you for your prompt attention to this request.

Signature X

Date

Need More Forms?

For additional blank forms, copy these pages
or go online to www.thebankofprinceton.com
and click on Switch Kit.



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