

# SwitchKit

Welcome to Central Valley Community Bank. You deserve a relationship with a bank that offers responsive service, expertise and a wide range of products and services. Switching accounts may seem overwhelming, but our SwitchKit guides you through the process.

## 1 Set Up Your Account

Provide the basic information for your new account. There are a variety of checking and savings plans available, so bring this information to a banking specialist and we will help tailor the account to meet your specific needs.

## 2 Change Your Direct Deposit

Transfer direct deposits from your old checking and savings account to your new CVCB account by completing the “Change Direct Deposit” form. Take or mail the completed form to:

- Your employer’s human resources department
- Companies handling retirement or pension payments
- Brokerage companies (interest, dividends)
- Contact the Social Security Administration directly for instructions to change SSI payments to your CVCB account at 800-772-1213 or go to [www.ssa.gov](http://www.ssa.gov).

## 3 Change Automatic Withdrawals

To change automatic withdrawals to your new account, make copies of the “Change Automatic Withdrawal” form and send to each company that withdraws from your account. This may include:

- Utilities
- Insurance
- Loans/Mortgages
- Internet/Phone Service

Within a few weeks, contact each company and confirm that they received and processed your request.

## 4 Close Old Accounts

Previous accounts should be left open and with enough money for outstanding checks and automatic withdrawals to clear. This may take several weeks. Once you know the old account is inactive, send the “Close Account” form to your former bank and request the balance from that account, then destroy old checks, ATM/debit cards and deposit slips.

**Questions? Call one of our Banking Specialists at (800) 298-1775 or stop by one of our convenient locations and we will be happy to help.**

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## 1 Open Your Checking Or Savings Account

Provide the basic information to open your account:

### Account Holder 1

Full Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
Physical Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Alternate Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Home Ph: \_\_\_\_\_ Work Ph: \_\_\_\_\_  
Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Birth Date: \_\_\_\_\_ Birthplace: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Primary ID (Type/Number): \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
Secondary ID (Type/Number): \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
Email Address: \_\_\_\_\_

### Account Holder 2

Full Name: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
Physical Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Alternate Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Home Ph: \_\_\_\_\_ Work Ph: \_\_\_\_\_  
Employer: \_\_\_\_\_ Occupation: \_\_\_\_\_  
Birth Date: \_\_\_\_\_ Birthplace: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Primary ID (Type/Number): \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
Secondary ID (Type/Number): \_\_\_\_\_ Issue Date: \_\_\_\_\_ Exp. Date: \_\_\_\_\_  
Email Address: \_\_\_\_\_

### For business accounts, please provide the following:

(Additional information will be required to open and establish your Business Account)

Business Name: \_\_\_\_\_ Tax ID#: \_\_\_\_\_  
Business Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_  
Business Ph: \_\_\_\_\_ Business Fax: \_\_\_\_\_  
Business Email: \_\_\_\_\_

- Sole Proprietorship
- Partnership
- Corporation
- Association

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## 2 Change Direct Deposit

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

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

To: \_\_\_\_\_  
(Employer/Depositor's Name)

\_\_\_\_\_  
(Address)

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

### To Whom It May Concern:

This form is notification that I have established a new account at Central Valley Community Bank.  
Please discontinue direct deposits to my old account number \_\_\_\_\_ (account number) with  
\_\_\_\_\_ (Bank) and immediately start direct deposits to my new account at:

**Central Valley Community Bank**  
7100 N. Financial Drive, Ste. 101  
Fresno, CA 93720

Attn: \_\_\_\_\_  
(Branch Name)

\_\_\_\_\_  
(Central Valley Community Bank Rep)

**Routing Number: 121137726**

**Account Number:** \_\_\_\_\_

Savings    Checking (check one)

My contact information is below should you require additional information or if you have any questions. Thank you.

### Account Holder Contact Information:

Signature: \_\_\_\_\_ Name (print): \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_



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### 3 Change Automatic Withdrawal

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

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

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

(Name of company that initiates the automatic withdrawal)

\_\_\_\_\_  
(Address)

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

#### To Whom It May Concern:

Please stop withdrawals in the amount of \$ \_\_\_\_\_ for \_\_\_\_\_  
(payment/type/description)

Former Bank: \_\_\_\_\_ Routing Number: \_\_\_\_\_

Account Number: \_\_\_\_\_ Or Card Number: \_\_\_\_\_

Please start withdrawing from my checking account or card shown below:

My account at:

**Central Valley Community Bank**  
7100 N. Financial Drive, Ste. 101  
Fresno, CA 93720

Attn: \_\_\_\_\_  
(Branch Name)

\_\_\_\_\_  
(Central Valley Community Bank Rep)

**Routing Number: 121137726**

**Account Number:** \_\_\_\_\_

Savings  Checking (check one)

My Central Valley Community Bank credit card:

Card Number: \_\_\_\_\_ Expiration: \_\_\_\_\_ CVV: \_\_\_\_\_

My contact information is below should you require additional information or if you have any questions. Thank you.

#### Account Holder Authorization/Information:

Signature: \_\_\_\_\_ Name (print): \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Customer Account Number: \_\_\_\_\_



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## 4 Request to Close Account

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

To: \_\_\_\_\_  
(Financial Institution Name)

\_\_\_\_\_  
(Address)

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

### To Whom It May Concern:

Please close my account(s) at your institution immediately following the credit of interest earned on my account:

Account Numbers: \_\_\_\_\_

I hereby authorize and instruct you (the previous bank named herein) to close my depository account and send the total remaining balance to Central Valley Community Bank to credit my account as shown below.

All checks and debits have cleared the account (s), and all automatic payments and debits have been transferred to my new account.

**Central Valley Community Bank**

7100 N. Financial Drive, Ste. 101  
Fresno, CA 93720

Attn: \_\_\_\_\_  
(Branch Name)

\_\_\_\_\_  
(Central Valley Community Bank Rep)

**Routing Number: 121137726**

**Account Number:** \_\_\_\_\_

Savings    Checking (check one)

My contact information is below should you require additional information or if you have any questions. Thank you.

Account Holder 1 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Account Holder 1 Name (print): \_\_\_\_\_

Account Holder 2 Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Account Holder 2 Name (print): \_\_\_\_\_

Address: \_\_\_\_\_ City, State, Zip: \_\_\_\_\_

Phone Number: \_\_\_\_\_

*Note: Central Valley Community Bank can neither predict nor control any closing fees that may be assessed by another financial institution in the fulfillment of this request.*

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