

New Account Information



Easy Switch Kit

Simple, Quick and Easy!

Southwest
Georgia
Bank
Switch Kit

Southwest Georgia Bank makes switching your account easy



Just read this easy "Switch Kit" and follow our simple four step process. We also provide you with forms to make it easy to redirect your automatic payments and direct deposits. **Once you OPEN your Southwest Georgia Bank account, be sure to immediately STOP using your old account.** If you need any assistance, please stop by any of our locations or call us at 229-985-1120.

STEP 1 Review your old account to determine if you had the following:

- Automatic payments (Insurance, Health Club, Utility Payments, etc.)
- Direct deposits (Payroll, Social Security, etc.)

STEP 2 **Complete the switch checklist.**

STEP 3 **Automatic payments and direct deposit:**

You will need your new Southwest Georgia Bank account number for this step. If you have automatic payments or deposits, **MAKE A COPY** and complete a **Switch Form for Automatic Payments and Direct Deposits** for **EACH** payment or deposit. You may need multiple copies of this form because you may have multiple payments and/or deposits. Bring them to any Southwest Georgia Bank location and we will mail them for you.

STEP 4 **Close your old account:**

Make sure that all checks have cleared and automatic payments and direct deposits have been switched to your new Southwest Georgia Bank account. **MAKE A COPY** and complete the **Existing Account Closing Notification Form** to notify your previous bank that you are closing your old account. Destroy all old checks, deposit slips and cards (atm/debit) associated with the old account. Bring this form to any Southwest Georgia Bank location and we will mail it for you.

SGB Online Banking and Bill Pay

Once your Southwest Georgia Bank account is open, let us arrange a quick demonstration on how to set up your online banking and bill pay system.

It's that easy!



Switch Checklist

Use this checklist to quickly identify all merchants who currently have access to your account.

Automatic Deposits

• PAYROLL:

Contact the HR Department where you work.
Effective Date of Change _____

• SOCIAL SECURITY:

Contact the Social Security Administration at 800-772-1213.
Effective Date of Change _____

• TRANSFER FROM OTHER BANK ACCOUNTS:

Effective Date of Change _____

• BROKERAGE DEPOSITS:

Effective Date of Change _____

• OTHER:

Effective Date of Change _____

Utilities - Automatic Payments

• GAS:

Account Number _____
Effective Date of Change _____

• ELECTRIC:

Account Number _____
Effective Date of Change _____

• WATER/SEWER:

Account Number _____
Effective Date of Change _____

• LOCAL—LONG DISTANCE TELEPHONE:

Account Number _____
Effective Date of Change _____

• CELLULAR TELEPHONE:

Account Number _____
Effective Date of Change _____

• INTERNET SERVICE:

Account Number _____
Effective Date of Change _____

• CABLE—SATELLITE TV:

Account Number _____
Effective Date of Change _____

• GARBAGE:

Account Number _____
Effective Date of Change _____

• OTHER _____:

Account Number _____
Effective Date of Change _____

• OTHER _____:

Account Number _____
Effective Date of Change _____

Other Payments

• LOANS:

Account Number _____
Effective Date of Change _____

Account Number _____
Effective Date of Change _____

• MORTGAGE:

Account Number _____
Effective Date of Change _____

• TRANSFERS TO OTHER BANK ACCOUNTS:

Account Number _____
Effective Date of Change _____

• INSURANCE:

Account Number _____
Effective Date of Change _____

• BROKERAGE—AUTO INVESTMENTS:

Account Number _____
Effective Date of Change _____

• OTHER _____:

Account Number _____
Effective Date of Change _____

• OTHER _____:

Account Number _____
Effective Date of Change _____

**Switch Form
for Automatic Payments
and Direct Deposits**



Make one copy of this form for each Automatic Payment and each Direct Deposit.

COMPANY NAME

COMPANY ADDRESS

CITY STATE

ZIP

Re: Switching My Automatic Payments/Direct Deposits

I have recently changed banks and would like to have my transactions with your company changed to my new account. Please discontinue transactions from my old account and begin using my **new Southwest Georgia Bank** account.

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

PRIMARY AUTHORIZED SIGNATURE (*Original Signature required to authorize change*)

DATE

SECONDARY AUTHORIZED SIGNATURE (*Original Signature required to authorize change*)

DATE

NAME

PHONE

SOCIAL SECURITY NUMBER

ADDRESS

CITY/STATE

ZIP CODE

OLD BANK NAME

ROUTING NUMBER

ACCOUNT NUMBER

Southwest Georgia Bank

NEW BANK NAME

061202025

ROUTING NUMBER

ACCOUNT NUMBER

Attach a voided check or deposit slip from your new Southwest Georgia Bank account to this form. Bring this form to any Southwest Georgia Bank location and we will mail it for you.

It's that easy!

Existing Account Closing Notification Form



OLD BANK NAME

OLD BANK ADDRESS

CITY STATE

ZIP

Re: Close My Account

I have recently changed banks. Please close the account listed below immediately.

ACCOUNT NAME

ACCOUNT NUMBER

Please forward all remaining funds to me at the following address:

NAME

ADDRESS

CITY/STATE

ZIP CODE

Sincerely,

AUTHORIZED SIGNATURE

DATE

Bring this form to any Southwest Georgia Bank location and we will mail it for you.

It's that easy!