

7 Simple Steps to Move Your Checking Account

Welcome to Heritage First Bank! If you've recently moved or looking to change banks, it isn't always easy to know where to start. We want that to be the least of your worries! Simply follow this step-by-step checklist to complete your transition:

1. Open Your New Account

Open your new Heritage First Bank at any of our three Rome locations. You can learn about all of checking accounts and account benefits by visiting www.heritagefirstbank.com.

2. Order New Checks and a Debit Card

These items typically take 7-10 business days to arrive. Once they do, you can begin using them and stop using items used to access your old account.

3. Ask Your Employer to Change Your Direct Deposit

Simply fill out the enclosed **Direct Deposit Change Form** and give to your employer or the person in charge of payroll. Need to make the change online? All the information you need can be found on the form or your new account documents. If you need to change a Social Security, VA or other federal benefit, simply call the agency and provide the information requested or stop by your nearest branch for assistance.

4. Contact Companies that Direct Debit Your Account

Using your bank statements, make a list of any automatic payments that you have authorized to be deducted directly from your account. Don't forget those quarterly or annual payments! Simply contact those companies directly or complete the enclosed **Automatic Payment Change Form**.

5. Set-up Online Access and Online Bill Pay for Your New Account

You have access to all of your Heritage First Bank accounts 24/7 through our eBranch using our website or mobile app. Add people you pay regularly, companies or individuals, to Bill Pay and pay all of your bills from one convenient location.

6. Close Your Old Account

After all of your direct deposits have been switched and all of your automatic payments are being debited from your new account, close your old bank account.

7. Enjoy Your New Banking Partner, Heritage First Bank



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FIRST BANK**
Member FDIC

Local Bank. Local Decisions.®

Direct Deposit Change Form

Date: _____

Employer's Company Name: _____

Company Address: _____

City, State, Zip: _____

To Whom It May Concern:

I have recently changed my banking relationship to Heritage First Bank. Please redirect my direct deposit to my new account at Heritage First Bank. I hereby authorize _____ (Company/Organization name) to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit error to my account indicated below and authorize Heritage First Bank to credit and/or debit the same to such account. This authority is to remain in full force and effect until company listed above, and Heritage First Bank have received notification from me of its termination and have had a reasonable opportunity to act on it.

My new account information is listed below:

Printed Name: _____

Signature: _____ Date: _____

Social Security Number or Tax ID Number: _____

Daytime phone number: _____

Heritage First Bank Account Number: _____

Heritage First Bank routing number: 061192481

Please attach a voided check from your new Heritage First Bank account here:



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Automatic Payment Change Form

Date: _____

Name of Account: _____

Address: _____

City, State, Zip: _____

To Whom It May Concern:

I have recently changed my banking relationship to Heritage First Bank. You are currently withdrawing \$_____ from the following account:

Old Bank: _____

Routing Number: _____

Account Number: _____

For (reason for payment): _____

On (date of month): _____

Please accept my authorization to stop making withdrawals from this account effective and start making them at that time from my Heritage First Bank account.

Heritage First Bank routing number: 061192481

Heritage First Bank account number: _____

Please contact me immediately with any questions at phone #: _____

Sincerely,

Signature-primary signer: _____

Name (please print): _____

Signature-secondary signer (if applicable): _____

Name (please print): _____