



Switch Kit

Switch today to The Light That Leads to Better Banking!



GETTING STARTED

Ready to switch? Switching to Chesapeake Bank of Maryland is as easy as 1, 2, 3, & 4. We will guide you through everything you need to make the switch. After all, we are **The Light That Leads to Better Banking!**

Step 1: Open your new account

Visit your local branch to open your new Chesapeake Bank of Maryland account(s).

Step 2: Switch your direct deposits

If you have any automatic payroll or income, use the provided forms to switch them to Chesapeake Bank of Maryland

Step 3: Switch your automatic withdrawals

If you have any automatic transactions or payments, use the provided forms to switch them to Chesapeake Bank of Maryland

Step 4: Close your old account

You are ready to switch once you have moved over your direct deposits, automatic payments, and all outstanding items have cleared your old account. The final step is to close your old account(s). Fill out the last form in this kit to close your old account(s). Any remaining account balance will be transferred to Chesapeake Bank of Maryland.



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Switch Kit

Direct Deposit Authorization

DIRECT DEPOSIT CHECKLIST

Use this list to remember all of your direct deposits that you need to switch.

- Employer Paychecks
- Pension or Retirement Plan Payments
- Social Security Payments
- Other Investment Income

HELPFUL HINTS

Follow up

Automatic deposits should take effect within three (3) deposit periods. If you do not see the deposit by this time, contact the company/agency. Keep your former account open until all automatic deposits are received into your Chesapeake Bank of Maryland account(s).

Track your request

To confirm that your automatic deposit is received, sign up and log into your online account, check your Chesapeake Bank of Maryland statement, or call your local branch.

Note

Some companies or organizations, like the Social Security Administration, may require special forms. For your reference, we included a chart on page 4 to assist you in verifying all of your automatic deposits and withdrawals.

Notification of Direct Deposit Authorization Change

Complete and submit this form to authorize your employer, retirement and pension funds, or any other agency to deposit your income directly into your Chesapeake Bank of Maryland account. Use one for each deposit.

Company or Employer

Company or Employer Street Address

City

State

Zip Code

(____) _____

Company or Employer Phone Number

Employee ID (if applicable)

Effective immediately, please deposit the net amount of my check to my Chesapeake Bank of Maryland account.

I authorize (name of employer/agency) _____ to automatically deposit funds into the account(s) below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.

Place an X next to your desired option

Net amount to Chesapeake Bank of Maryland **CHECKING ACCOUNT**

Checking Account #

252070545

Routing #

Net amount to Chesapeake Bank of Maryland **SAVINGS ACCOUNT**

Savings Account #

252070545

Routing #

Signature

Date

Printed Name

Street Address

City

State

Zip Code

(____) _____

Phone Number

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Switch Kit

Automatic Withdrawal Authorization

AUTOMATIC WITHDRAWAL CHECKLIST

Use this list to remember all of your automatic payments set to automatically deduct from your account or debit card.

See the chart on page 4 for a list of companies and organization that you may need to contact to update your financial information.

HELPFUL HINTS

Follow up

Automatic withdrawals should take effect within five (5) business days. If you do not see the withdrawals by this time, contact the company. Keep your former account open until all automatic withdrawals are received into your Chesapeake Bank of Maryland account(s).

Track your request

To confirm that your automatic withdrawal posted, sign up and log into your online account, check your Chesapeake Bank of Maryland statement, or call your local branch.

Note

Some companies or organizations, like the Social Security Administration, may require special forms. For your reference, we included a chart on page 4 to assist you in verifying all of your automatic deposits and withdrawals.

Notification of Withdrawal Authorization Change

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal. Or, many companies and agencies make it easy to change your account on record online.

Company

Account Number

Payment Amount

Company Street Address

City

State

Zip Code

(____) _____

Company Phone Number

Please **change** my automatic withdrawal from the following account:

Financial Institution

Account#

Bank Routing #

Please make all **future** automatic withdrawals from the following account:

Chesapeake Bank of Maryland

Financial Institution

252070545

Account #

Bank Routing #

Thank you very much

This authorization will remain in effect until I have submitted to you new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature

Date

Printed Name

Street Address

City

State

Zip Code

(____) _____

Phone Number





Switch Kit

Direct Deposit & Automatic Withdrawal Chart

Direct Deposits	Payer	Amount	Date Paid	Account #
Your Payroll				
Social Security				
Pension/Retirement				
Investment Income				
Other				
Other				

Payments	Company	Amount	Due Date	Account #
Mortgage or Rent				
Car Loan				
Credit Card				
Credit Card				
Electric, Gas, Oil, or Coal				
Cellphone				
TV, Phone, & Internet				
Water				
Sewer				
Garbage				
Insurance				
Gym/Health Club				
Day Care				
Homeowner's Association Dues				
Other				
Other				

Helpful information

- Social Security Administration** (800) 772-1213 www.ssa.gov
Office of Public Inquiries, Windsor Park Building, 6401 Security Blvd, Baltimore, MD 21235
- Department of Veterans Affairs** (800) 827-1000 www.va.gov
810 Vermont Ave NW, Washington DC 20420
- Office of Personnel Management** (888) 767-6738 www.opm.gov
1900 E Street NW, Washington DC 20415
- U.S. Railroad Retirement Board** (877) 772-5772 www.rrb.gov
844 N Rush Street, Chicago, IL 60611



Switch Kit

Account Closure Authorization

CONGRATULATIONS!

You had to sign your name quite a number of times, but submitting these forms completes your switch to a better banking experience. We want you to experience the difference in banking with Chesapeake Bank of Maryland.

Welcome to our family!

Notification of Account Closure Authorization

Complete this form to close your account(s) at your former financial institution and either drop off to a local branch or mail it in. Be sure to verify that all outstanding items have cleared in your old account.

To Whom It May Concern:

Financial Institution

Street Address

City

State

Zip Code

Please send my remaining balance to :

Deposit Directly to my new account at Chesapeake Bank of Maryland:

Account #

252070545

Routing #

Or forward me a check to my address below:

Signature

Date

Printed Name

Street Address

City

State

Zip Code

(____) _____
Phone Number