



Effortless**Switch**Kit

Switching banks has never been easier!

Interested in switching your accounts to *PEB*? Not sure how to get started? We've developed the PEB Effortless Switch Kit, a step-by-step guide to help make your transition to becoming a new customer as simple as possible. Just follow the steps to get started.

If we can be of any assistance throughout this transition, please call on our friendly Customer Service Representatives at **(251) 575-4555**.

Thank you for choosing us and welcome to the PEB family.

Harvey J Gaston Jr
Chief Executive Officer

Step 1: Open a *PEB* Checking account! Come see an Account Service Representative at our office in Monroeville, AL and let us help determine what account(s) best fit you.

We know your time is valuable, complete the Customer Information Form before coming in to make the process as fast as possible.

Step 2: Sign up for *PEB* Online Banking and Mobile Banking! Track your direct deposits, checks, debit card transactions, and automatic payments with ease. Take advantage of our FREE Online and Mobile Banking.

Step 3: Stop using your former checking account. Be sure to allow time for all outstanding debit card transactions and checks to clear. For your security, destroy any unused checks, deposit slips, and Debit/ATM card. If you like, we can do that for you.

Step 4: Move your Direct Deposit(s) to your new *PEB* by using the Direct Deposit Request Form.

Step 5: Transfer any Automatic Payments and Debits to your new *PEB* Checking account using the Automatic Payment Request Form. Remember to add any recurring payments you make by ACH, Debit Card, and Automatic Transfer.

Step 6: Close your former checking account. When you are sure that all outstanding items have cleared **and** your Direct Deposits and Automatic Payments have made the switch to your new *PEB* Checking account, then it's time to close your former checking account. Take or mail the completed Account Closing Request Form to your former bank or call them to make arrangements to close the account and forward any remaining funds to you.

Peoples Exchange Bank

2013 Hwy 21 Bypass/P.O. Box 865
Monroeville, AL 36461

Phone: 251 575-4555
Fax: 251 575-2948

Routing Number (ABA): 062102593
www.peb.bank

*Since 1907, Peoples Exchange has been a
Better Way to Bank*

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CUSTOMER INFORMATION FORM

Primary Account Holder Information

Full Legal Name:

Physical Address:

City:

State:

Zip:

Mailing Address: if different from above

City:

State:

Zip:

Home Phone:

Work Phone:

Mobile Phone:

Drivers License/ID #:

Issue Date:

Exp. Date:

Employer:

Position/Title:

E-mail Address:

Secondary Account Holder Information

Full Legal Name:

Physical Address:

City:

State:

Zip:

Mailing Address: if different from above

City:

State:

Zip:

Home Phone:

Work Phone:

Mobile Phone:

Drivers License/ID #:

Issue Date:

Exp. Date:

Employer:

Position/Title:

E-mail Address:

Accounts and Services

Please check the Accounts and Services you are currently using and/or may wish to use.

*Pending approval

- | | | |
|---|---|--|
| <input type="checkbox"/> Personal Checking Account | <input type="checkbox"/> Business Checking Account | <input type="checkbox"/> Timber/Land Loan |
| <input type="checkbox"/> Interest Bearing Personal Checking | <input type="checkbox"/> Interest Bearing Business Checking | <input type="checkbox"/> Agricultural Loan |
| <input type="checkbox"/> Personal Savings Account | <input type="checkbox"/> Business Savings Account | <input type="checkbox"/> Consumer Loan |
| <input type="checkbox"/> Online Banking | <input type="checkbox"/> Business Certificate of Deposit | <input type="checkbox"/> Business Loan/Line* |
| <input type="checkbox"/> Mobile Banking | <input type="checkbox"/> Debit Card | <input type="checkbox"/> Mortgage Loan* |
| <input type="checkbox"/> Personal Certificate of Deposit | <input type="checkbox"/> ATM Card | <input type="checkbox"/> Construction Loan* |
| <input type="checkbox"/> Safe Deposit Box | <input type="checkbox"/> Mobile Business Banking | <input type="checkbox"/> Other: _____ |

Since 1902, Standing the test of time.....

Direct Deposit Request Instructions

Direct Deposits

Use your previous bank statements and our handy checklist to identify the Direct Deposits you need to switch to your new **PEB Checking account**.

Direct Deposit Checklist

| Payment | Company | Account Number | Amount | Date of Payment |
|---------------------|---------|----------------|--------|-----------------|
| Employee Payroll | | | | |
| Pension/Retirement | | | | |
| Social Security | | | | |
| Supplement Security | | | | |
| VA Compensation | | | | |
| Interest Income | | | | |
| Investment Income | | | | |
| Dividends | | | | |
| Other: | | | | |

Use the [Direct Deposit Request Form](#) to notify depositors of your new **PEB Checking account** information. **Before** you send out the form be sure to check with your employer or source of income to make sure no other forms are required.

Helpful Phone Numbers and Web Sites

| | | |
|--------------------------------|--------------|--|
| Social Security Administration | 800 772-1213 | www.ssa.gov/deposit/howtosign.htm |
| Railroad Retirement Board | 800 808-0772 | www.rrb.gov |
| Department of Veteran Affairs | 800 827-1000 | www.va.gov |
| | | |

After you have sent the [Direct Deposit Request Form](#):

1. Confirm with your employer or source of income that forms were received and processed.
2. Maintain your former checking account until the switch is complete.
3. Monitor your new **PEB Checking account** through **PEB** Internet or Mobile Banking, or call Bookkeeping at 251 575-4555 to verify receipt of your Direct Deposit(s).

Direct Deposit Request Form

Company Name:

Address:

City, State, Zip

RE: Switching My Direct Deposit to a New Account

I have recently changed financial institutions and would like to update my Direct Deposit information. Please discontinue my current direct deposit and begin making direct deposits into my new **PEB Checking account**.

If you have any questions regarding this matter, please contact me by mail or call me at the phone number provided below.

I am aware that some automatic deposits may require advance notice of changes and that depending on the timing of this request my next deposit may not be sent to my new bank account.

Thank you for your prompt assistance in this matter.

Sincerely,

Authorized Signature

Date

Direct Deposit Information

| | | | |
|---|-------|--------------------------------------|--|
| Name: | | SSN or Employee No. | |
| Address: | City: | State & Zip: | |
| Home Phone: | | Mobile Phone: | |
| Former Bank Name: | | Routing Number: | |
| Former Account Number: | | Amount of Deposit: | |
| NEW Bank Name: Peoples Exchange Bank | | NEW Routing Number: 062102593 | |
| NEW Account Number: | | Amount of Deposit: | |

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Automatic Payment Request Instructions

Automatic Payments

Use your previous bank statements and our handy checklist to identify the Automatic Payments and Debits you need to switch to your new **PEB Checking account**.

Automatic Payment Checklist

| Payment | Company | Account Number | Amount | Date of Payment |
|-------------------|---------|----------------|--------|-----------------|
| Mortgage/Rent | | | | |
| Auto Loans | | | | |
| Insurance | | | | |
| Electric | | | | |
| Telephone | | | | |
| Cable/TV | | | | |
| Cell Phone | | | | |
| Gas/Oil | | | | |
| Water | | | | |
| Internet Provider | | | | |
| Credit Cards | | | | |
| Daycare | | | | |
| Tuition/School | | | | |
| Trash Removal | | | | |
| Other: | | | | |

Use the [Automatic Payment Request Form](#) to notify debiting companies of your new **PEB Checking account** information. **Before** you send out the form be sure to check with these companies to make sure no other forms are required. You may be able to make changes to account information online.

After you have sent the [Automatic Payment Request Forms](#):

1. Confirm with companies that forms were received and processed.
2. Maintain your former checking account until the switch is complete.
3. Monitor you new **PEB Checking account** through **PEB** Internet or Mobile Banking, or call Bookkeeping at 251 575-4555 to verify debits have been posted.

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Automatic Payment Request Form

Company Name:

Address:

City, State, Zip

RE: Switching My Automatic Payments to a New Account

Attn: Accounts Receivable/Accounting

I have recently changed financial institutions and would like to update my automatic payment information. Please discontinue my current debit arrangement and begin making automatic withdrawals from my new **PEB Checking account**.

If you have any questions regarding this matter, please contact me by mail or call me at the phone number provided below.

I am aware that some automatic withdrawals may require advance notice of changes and that depending on the timing of this request my next automatic payment may not be withdrawn from my new bank account.

Thank you for your prompt assistance in this matter.

Sincerely,

Authorized Signature

Date

Automatic Payment Information

| | | | | | |
|---|--|-------|--------------------------------------|--------------|--|
| Name: | | | Payee Name: | | |
| Address: | | City: | | State & Zip: | |
| Home Phone: | | | Mobile Phone: | | |
| Former Bank Name: | | | Routing Number: | | |
| Former Account Number: | | | Amount of Debit: | | |
| NEW Bank Name: Peoples Exchange Bank | | | NEW Routing Number: 062102593 | | |
| NEW Account Number: | | | Amount of Deposit: | | |

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Account Closing Request Instructions

Before sending the Account Closing Request Form:

1. Check with your former bank to make sure that no additional information or forms are required.
2. If multiple accounts are involved, please complete a form for each account.
3. Inquire about any possible penalties with respect to early withdrawal before you close the account. If the account you are closing is a Certificate of Deposit (CD) it is important to check the maturity date. You may want to delay the switch of a CD to avoid penalties.
4. Verify that all checks and automatic payments have cleared prior to submitting the Account Closing Request Form.
5. Be sure that all automatic transactions have made the switch to your new **PEB Checking Account** prior to submitting the Account Closing Request Form.

After you've sent the Account Closing Request Form:

1. Check account statements from your former bank to verify that accounts have a zero balance and have been closed.
2. Enjoy your new **PEB Checking Account** and all the great services that **Peoples Exchange Bank** has to offer.

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Account Closing Request Form

Date:

Bank Name:

Address:

City, State, Zip

Primary Account Holder:

Name:

Address:

City, State, Zip

Secondary Account Holder:

Name:

Address:

City, State, Zip

RE: Account Number _____

Checking Savings Other

Attention: Account Services

Please accept this letter as my official authorization to close my account with your institution.

Please send a check in the amount of my account balance, if any, to my attention at the address you have on file. If you have any questions regarding this matter please call me at my daytime phone number: _____.

Thank you for your prompt assistance.

Sincerely,

Customer Signature

