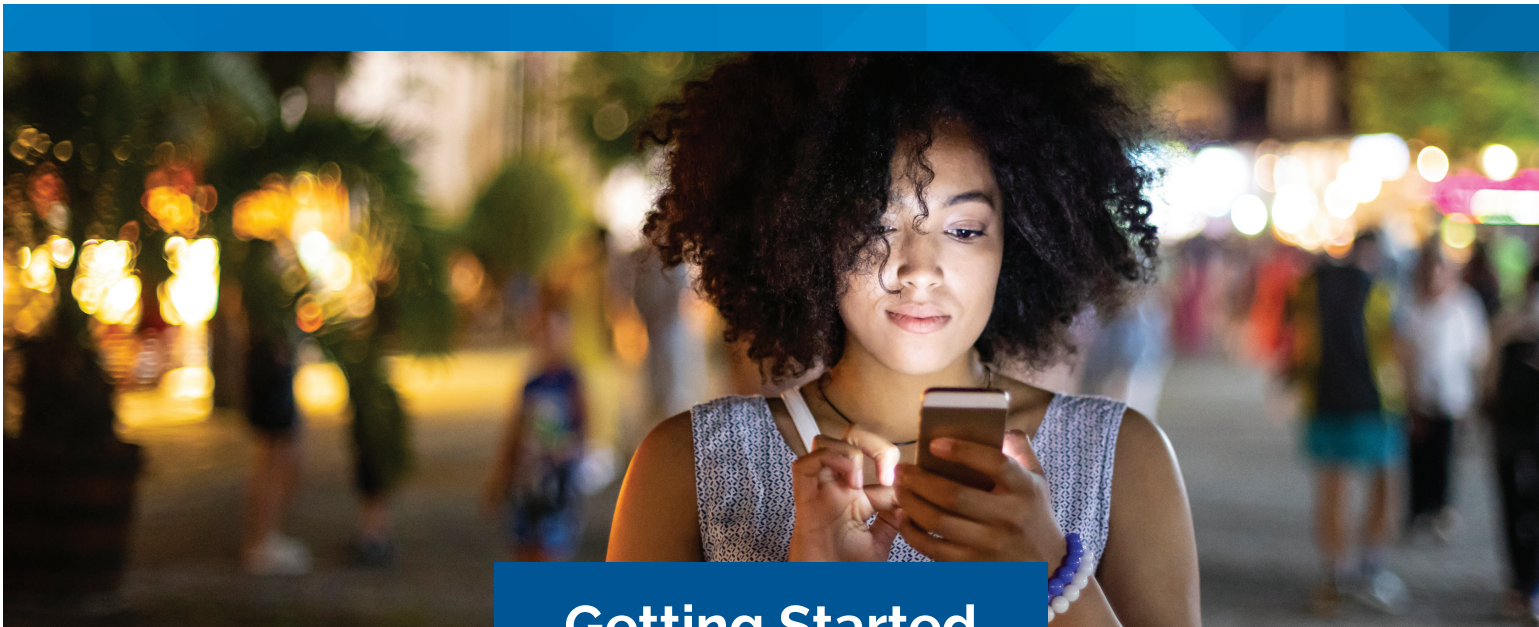


*It's so easy to switch*

# **A Step-By-Step Guide to Changing Banks**





# Getting Started

We've taken the hassle out of moving your accounts from your current bank to Fidelity Bank with step-by-step instructions and simple-to-complete forms.

## 5 STEPS TO BETTER BANKING

1

### Open and Fund Your New Fidelity Bank Account.

We offer a variety of checking accounts to meet your needs! Visit your local Fidelity Bank branch to open an account or open an account online at [fidelitybanknc.com/open-account](https://fidelitybanknc.com/open-account). Once your new Fidelity Bank account is open and your debit card is ordered, stop using your old account to let transactions clear.

2

### Enroll in Digital Banking.

Digital Banking at Fidelity Bank makes banking on the go easier! Sign up for online banking and bill payment, download the Fidelity Bank mobile app, add your digital debit card to your phone's digital wallet, setup Zelle, and enroll in online statements.

3

### Transfer Your Direct Deposit.

Contact your employer(s), your retirement plan provider(s), and any other sources of income to update your account information. If you receive Social Security payments, visit [godirect.org](https://godirect.org) to update where your payment is deposited. If needed, use **FORM 1** to help switch your direct deposits.

4

### Change Your Payments.

Identify bill payments, automatic withdrawals, and subscription services that use your old account. Then, set up your bills in Fidelity Bank's Bill Payment service or log in to the payee account to update your information. Don't forget to update websites or apps where you saved your old account information or debit card (e.g. Amazon, Venmo, etc.). Use **FORM 2** to help you get organized.

5

### Close Your Old Account.

Now that you transferred your direct deposit(s), your transactions have cleared your old account, and you've changed your payments, there's just one more step. Contact your old bank to close your account(s). If needed, use **FORM 3** to help you complete this step.



## FORM 1

### **Transfer Your Direct Deposit.**

Contact your employer(s), your retirement plan provider(s), and any other sources of income to update your account information. If you receive Social Security payments, visit [godirect.org](http://godirect.org) to update where your payment is deposited. If needed, use FORM 1 to help switch your direct deposits.

*Please use one form for each direct deposit.*

# Direct Deposit Checklist



Use your old bank statements to identify direct deposits you need to switch to your new Fidelity Bank account. Monitor your new Fidelity Bank account and confirm receipt of direct deposit(s) before closing your old account.

## Old Account Information:

\_\_\_\_\_

Routing Number

\_\_\_\_\_

Account Number(s)

## Fidelity Bank Account Information:

**053103585**

\_\_\_\_\_

Routing Number

\_\_\_\_\_

Account Number(s)

## Direct Deposits:

List all direct deposits to your account(s).

Deposit Type	Company	Account Number	Amount	Date of Payment	Transferred?
Payroll					<input type="checkbox"/>
Payroll					<input type="checkbox"/>
Social Security					<input type="checkbox"/>
Social Security					<input type="checkbox"/>
Pension					<input type="checkbox"/>
Retirement					<input type="checkbox"/>
Interest Income					<input type="checkbox"/>
Investment Income					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

# Direct Deposit Authorization Form



Please change the account for my direct deposit.

\_\_\_\_\_  
Date Company Making Direct Deposit

\_\_\_\_\_  
Company Address City/State/Zip

To whom it may concern:

You are currently depositing my entire paycheck or a part of my paycheck or a type of payment into the following account:

\_\_\_\_\_  
Old Financial Institution Old Routing Number

\_\_\_\_\_  
Old Account Number(s)

Please begin making these automatic deposits into my new Fidelity Bank account.

**053103585**

\_\_\_\_\_  
New Bank Routing Number

\_\_\_\_\_  
New Account Number Amount of Deposit  Checking  Savings

\_\_\_\_\_  
New Account Number Amount of Deposit  Checking  Savings

If you have any questions about this request, please call me. Thank you!

\_\_\_\_\_  
My Name (please type or print) Phone Number

\_\_\_\_\_  
Address City/State/Zip

\_\_\_\_\_  
Signature Date

Please include a voided Fidelity Bank check with your request.

A woman with dark hair tied back, wearing a dark blue shirt with white polka dots, is sitting at a wooden desk. She is smiling and looking at a white document she is holding in her hands. A laptop is open in front of her on the desk. The background shows a window with light-colored curtains and a bookshelf.

## FORM 2

### **Change Your Payments.**

Identify bill payments, automatic withdrawals, and subscription services that use your old account. Then, set up your bills in Fidelity Bank's Bill Payment service or log in to the payee account to update your information. Don't forget to update websites or apps where you saved your old account information or debit card (e.g. Amazon, Venmo, etc.). Use FORM 2 to help you get organized.

# Transaction Checklist



Use your old bank statements to identify the transactions you need to switch to your new Fidelity Bank account. Make sure that all transactions, including checks, debit card transactions, and ATM transactions, have cleared before closing your old account.

## Old Account Information:

Debit Card Number(s)

Routing Number

Previous Account Number(s)

## Fidelity Bank Account Information:

Debit Card Number(s)

**053103585**  
Routing Number

Account Number(s)

## Bill Payments:

Log in to online banking at your old financial institution and list all payees that you have set up in bill payment.

Company	Account Number	Phone Number	Address	Set Up?
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
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				<input type="checkbox"/>
				<input type="checkbox"/>





# Transaction Checklist



## Recurring Subscriptions:

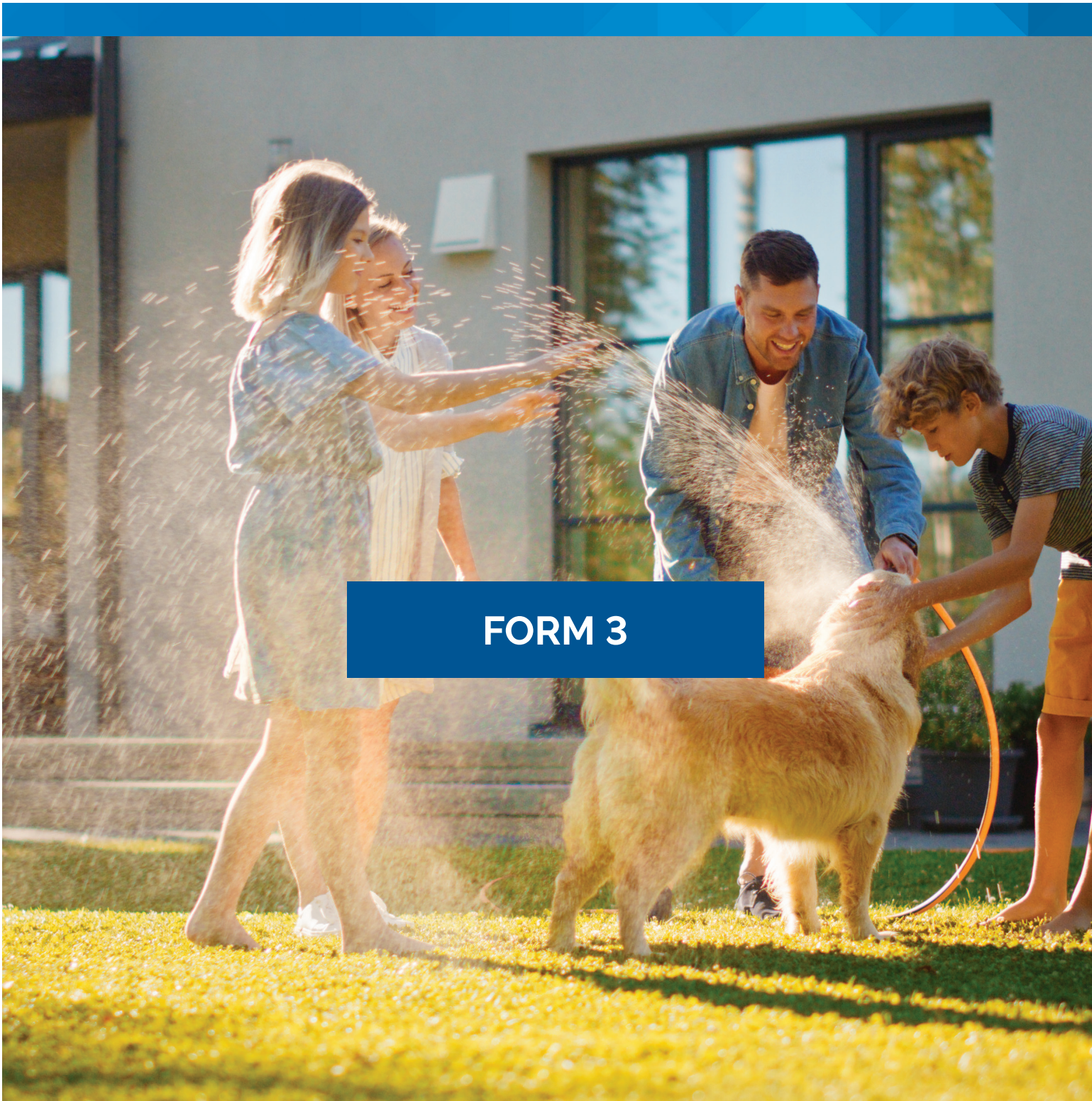
List all subscriptions that you're enrolled in.

Withdrawal Type	Company	Account Number	Amount	Date of Payment	Updated?
Music (i.e. Sirius XM)					<input type="checkbox"/>
Streaming (i.e. Hulu)					<input type="checkbox"/>
Grocery (i.e. Walmart+)					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

## Websites and Apps:

List anywhere your account information or debit card is saved.

Website or App	Username	Password	Account or Debit Card Number	Updated?
Amazon				<input type="checkbox"/>
PayPal				<input type="checkbox"/>
Venmo				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>



## FORM 3

### **Close Your Old Account.**

Now that you transferred your direct deposit(s), your transactions have cleared your old account, and you've changed your payments, there's just one more step. Contact your old bank to close your account(s). If needed, use FORM 3 to help you complete this step.

*Please feel free to make as many copies of the form as needed.*

# Account Closing Request Form



Please close my account.

\_\_\_\_\_  
Date Bank Name

\_\_\_\_\_  
Address City/State/Zip

### To whom it may concern:

Please close the following account(s) with your institution:

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

\_\_\_\_\_  
Account Number  Checking  Savings  Money Market  Other \_\_\_\_\_

Please send any funds remaining in the above account(s) to the address listed below:

\_\_\_\_\_  
My Name (please type or print) Phone Number

\_\_\_\_\_  
Address City/State/Zip

\_\_\_\_\_  
Primary Account Holder Signature Date

\_\_\_\_\_  
Secondary Account Holder Signature Date



## NEED HELP?

Contact your local banker, visit a convenient branch location,  
or call our Customer Care Center at 1-855-547-1385.