Personal and Business Banking • Loans and Mortgages • Wealth Management Services

Easy Switch Kit

Switch your bank accounts to Bridgeview Bank Group the *Easy* way

BRIDGEVIEW BANK GROUP
A Better Banking Experience®

800.794.2070 | bridgeviewbank.com

EQUAL HOUSING LENDER MEMBER FDIC

Easy Switch Kit – Switch your bank accounts to Bridgeview Bank Group the *Easy* way.

Are you looking for a step-by-step process to easily switch your accounts to Bridgeview Bank Group?

Just follow the simple steps listed in this guide to get started. Banking professionals at Bridgeview designed the instructions and forms found in this ***Easy Switch Kit*** to help make your account transitions as quick and easy as possible. We look forward to working with you!

This Switch Kit contains the following:

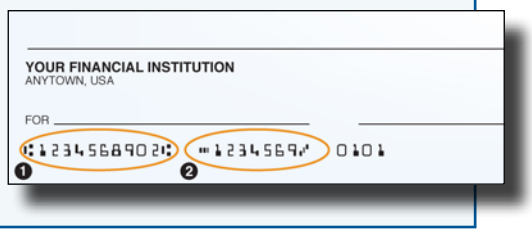
- Automatic Payment Checklist
- Direct Deposit Checklist
- Helpful Phone Numbers and Websites
- Account Closing Form
- Automatic Payment or Withdrawal Authorization Change Form
- Direct Deposit Authorization Change Form

If you need assistance during any part of the account transition process, please contact our Customer Care Center at 800.794.2070 - or visit your local branch.

HOW TO FIND ROUTING AND ACCOUNT NUMBERS:

❶ Bank Routing Numbers are the 9-digit numbers located in the bottom left corner of a check.

❷ Your account number is the series of numbers appearing just after the Routing Number, or to the right of the check sequence number.



Follow the 6 steps below to transfer all of your essential account information to Bridgeview Bank Group. Use the documents in this packet to keep track of the information required for a seamless transition.

1) Open an account. You may open your account in a branch, or online. Here's how:

- Use the Locations link on our company website (bridgeviewbank.com) to locate the branch nearest you. Stop in and a Personal Banker will be happy to assist you.
- To apply online, visit our website and click the **Open an Account Online** menu. Choose the account type you require, and the secure account set-up utility will walk you through the process.

2) Sign up for Bridgeview Online Banking:

- Conveniently and securely track your new deposits, transfer funds, pay bills, view cleared checks and more. To sign-up, visit our website and go to the Online Banking section to begin the process.

3) Stop using your former account(s) and begin using your Bridgeview account as soon as possible:

- Be sure to leave sufficient funds in your old account until all checks have cleared and any automatic withdrawals have been transferred to Bridgeview.

4) Change your Direct Deposits to Bridgeview Bank:

- Use the attached ***Direct Deposit Authorization Change Form*** to change your direct deposits. If available, please attach a VOIDED check to the completed form.

5) Change your Automatic Payments and Withdrawals to Bridgeview Bank:

- Use our attached ***Automatic Payment and Withdrawal Form*** to change all automatic payments and withdrawals.

3) Close your old account(s):

- Use the attached ***Account Closing Form*** to close accounts with your former financial institutions. We recommend that you shred and destroy old checks, debit cards, other documents you will no longer need.

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Use this form to gather all of your Auto Pay and Direct Deposit information in one place for easy reference.

Automatic Payment Checklist

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loan				
Insurance				
Credit Card				
Gas/Oil				
Electric				
Cable/Satellite/TV				
Telephone				
Cell Phone				
Water				
Trash Removal				
Internet Provider				
Health Club				
Investments				
IRA/Retirement				
Charities				
Daycare				
Tuition/School				
Other Expense				

Direct Deposit Checklist

Payment	Company	Account Number	Amount	Date of Payment
Employee Payroll				
Pension(s)/Retirement Plans				
Social Security				
Investment Incomes				
Other				

Helpful Phone Numbers and Websites

Social Security Administration	800.772.1213	www.ssa.gov
Office of Personnel Management	888.767.6738	www.opm.gov
Railroad Retirement Board	800.808.0772	www.rrb.gov
Department of Veterans Affairs	877.838.2778 or 800.827.1000	www.va.gov

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Request to Close An Account

Use this form to close your account at another bank institution and request a check for the remaining balance.

Date: _____

To:

_____ (Bank Name)

_____ (Bank Address)

_____ (City, State, Zip)

Primary Account Holder:

_____ (Name)

_____ (Home Address)

_____ (City, State, Zip)

Secondary Account Holder:

_____ (Name)

_____ (Home Address)

_____ (City, State, Zip)

PLEASE NOTE:

1) If there are multiple accounts involved, please complete a form for each account.

2) Verify all checks and payments have cleared prior to submitting this form to close your account.

Please accept this as my authorization and direction to close my account with your institution.

Account Number: _____

☐ Checking ☐ Savings ☐ CD ☐ Money Market ***(select one per form)***

Please send the check in the amount of my account balance plus any accrued interest to my attention at the address listed in the Primary Account Holder area above.

If you should have any questions regarding this transaction please call me at: _____

Sincerely,

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Automatic Payment or Withdrawal Authorization Change Form

Use this form to change your Automatic Payments or Withdrawals to Bridgeview Bank (e.g. loan payment, insurance payment, transfers to brokerage accounts or savings accounts).

Date: _____

To:

_____ (Bank Name)

_____ (Bank Address)

_____ (City, State, Zip)

From:

_____ (Name)

_____ (Home Address)

_____ (City, State, Zip)

PLEASE NOTE:

1) If there are multiple payments involved, please complete a form for each.

Please accept this letter as authorization to change the bank account information for automatic payments or withdrawals in the name of: _____, customer account number: _____, payment type: (i.e. Mortgage, Auto, Utilities, etc), approximate amount of transfer _____.

I am aware that some automatic payments or withdrawals require advance notice of changes. Please include those notice periods when determining the new effective date.

Effective immediately, the new bank information is as follows:

Bridgeview Bank Account Number: _____

☐ Checking ☐ Savings ☐ CD ☐ Money Market ***(select one per form)***

ABA Bank Routing Number: **0719 235 69**

If you should have any questions regarding this transaction please call me at: _____
Please send me written confirmation of when the change will be effective. If available, kindly attach a voided check from my account.

Sincerely,

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Direct Deposit Authorization Change Form

Use this form to change your direct deposit to Bridgeview Bank (payroll, dividends, royalties, etc).

Date: _____

To:

_____ (Bank Name)

_____ (Bank Address)

_____ (City, State, Zip)

Primary Account Holder:

_____ (Name)

_____ (Home Address)

_____ (City, State, Zip)

PLEASE NOTE:

1) If there are multiple accounts involved, please complete a form for each account.

2) Contact your employer(s) concerning Direct Deposit changes.

3) Verify your HR department does not require the use of their forms.

Please accept this letter as authorization to change the bank account information for direct deposit in the name of:

_____, payment type: (i.e. Payroll, Pension/Retirement, Investment Income, other-please specify)

_____.

I am aware that some automatic deposits require advance notice of changes. Please include those notice periods when determining the new effective date. Effective immediately, the new bank information is as follows:

Bridgeview Bank Group: 7940 S. Harlem Ave. Bridgeview, IL 60455

Bridgeview Bank Account Number: _____

☐ Checking ☐ Savings ☐ CD ☐ Money Market ***(select one per form)***

ABA Bank Routing Number: **0719 235 69**

If you should have any questions regarding this transaction please call me at: _____
Please send me written confirmation of when the change will be effective. If available, kindly attach a voided check from my account.

Sincerely,