



## *Switch to Service*

Ready to switch to a bank with great customer service? Now it is easier than ever.

1. Complete this *Switch to Service* kit.
2. Look over the New Account Checklist, which will prepare you to open your account in the quickest and easiest fashion possible.
3. Come to **McKenzie Banking Company/Foundation Bank** where someone is willing to spend time helping you meet all of your financial needs.

**Mc Kenzie**

676 N Main St

731-352-2262

OR

15345 Highland Ave

731-352-2262

**Paris**

1137 E Wood St

731-642-3130

**Alamo**

9 North Bells St

731-696-2265

OR

1467 W Church St

731-696-5427

**Jackson**

1049 Union Univ. Dr

731-554-2425

**Obion**

224 S 7th St

731-536-5363

**Paris Landing**

Eagle Creek Plaza

14201 Hwy 79 N

731-641-8885

MEMBER  
FDIC

# *Switch to Service*

## **New Account Checklist**

Please bring the following items to **McKenzie Banking Company/Foundation Bank** in order to *Switch to Service*.

- Two Forms of ID – Please bring a primary and secondary form of identification.
  - Primary: State issued license or ID card, Military ID, Passport, U.S. alien ID, or Certificate for driving
  - Secondary: Social Security card, Birth certificate, Voter registration card, or Student ID
- Current Bank Statements
- List of current Direct Deposits – fill out the Direct Transaction Checklist and then use the Direct Deposit Letter to make switching easier!
- List of current Direct Withdrawals – fill out the Direct Transaction Checklist and then use the Direct Withdrawal Letter to make switching easier!

*Remember to leave enough funds in your old account to cover any outstanding transactions. It can take a while for direct deposits and withdrawals to switch so allow enough time for this before closing your old accounts. Then use the Account Closure Letter to Switch to Service.*

# *Switch to Service*

## **Customer Information**

PRIMARY ACCOUNT HOLDER

SECONDARY ACCOUNT HOLDER

\_\_\_\_\_  
Name

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
Address (if different)

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Mailing Address (if different)

\_\_\_\_\_  
Mailing Address (if different)

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Home Phone

\_\_\_\_\_  
Work Phone

\_\_\_\_\_  
Work Phone

\_\_\_\_\_  
Social Security #

\_\_\_\_\_  
Social Security #

\_\_\_\_\_  
Driver's License #

\_\_\_\_\_  
Driver's License #

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Date of Birth

\_\_\_\_\_  
Employer

\_\_\_\_\_  
Employer

# *Switch to Service*

## **Direct Transaction Checklist**

Record all of your direct transactions and then use the Letters in the *Switch to Service* kit to enable you to get everything switched to your new **McKenzie Banking Company/Foundation Bank** account.

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

Company Name \_\_\_\_\_  
Account # \_\_\_\_\_  
Phone # \_\_\_\_\_  
Address \_\_\_\_\_

## Direct Deposit Letter

\_\_\_\_\_  
Date

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Company Address

\_\_\_\_\_  
City, State, Zip

To Whom It May Concern:

Currently you are depositing into this account number \_\_\_\_\_, and this routing number \_\_\_\_\_ from \_\_\_\_\_ Bank. I am no longer using that account.

Please switch my account number to \_\_\_\_\_ and my routing number to \_\_\_\_\_. My new account is with McKenzie Banking Company/Foundation Bank, a Division of McKenzie Banking Company. If you have any questions, please contact me at (\_\_\_\_) \_\_\_\_ - \_\_\_\_ .

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

I have attached a voided check from McKenzie Banking Company/Foundation Bank for your convenience.

## Direct Withdrawal Letter

\_\_\_\_\_  
Date

\_\_\_\_\_  
Company Name

\_\_\_\_\_  
Company Address

\_\_\_\_\_  
City, State, Zip

To Whom It May Concern:

Currently you are withdrawing from this account number \_\_\_\_\_, and this routing number \_\_\_\_\_ from \_\_\_\_\_ Bank. I am no longer using that account.

Please switch my account number to \_\_\_\_\_ and my routing number to \_\_\_\_\_. My new account is with McKenzie Banking Company/Foundation Bank, a Division of McKenzie Banking Company. If you have any questions please contact me at (\_\_\_\_) \_\_\_\_ - \_\_\_\_\_.

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

I have attached a voided check from McKenzie Banking Company/Foundation Bank for your convenience.

## Account Closure Letter

\_\_\_\_\_  
Date

\_\_\_\_\_  
Financial Institution

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

To Whom It May Concern:

This letter is to request that account number \_\_\_\_\_ be closed and a check for the remaining balance be sent to the address below.

Please contact me at (\_\_\_\_) \_\_\_\_ - \_\_\_\_ when you receive this letter because I would like to be aware of when my account is closed.

Thank you,

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip