



SWITCHING IS EASY

Gulf Coast Bank Switch Kit



GULF COAST BANK
& Trust Company

Gulf Coast Bank Switch Kit

Now that you made the right choice, let Gulf Coast Bank help you make the switch.

The checklist below will help you keep track of all the information that you need to switch to Gulf Coast Bank.

___ **Open a Gulf Coast Bank Account**

- ___ Checking Account Number _____ Routing Number _____
- ___ Receive and activate your Debit Card
- ___ Order Checks

___ **Enroll in Online Banking and Bill Payments**

- ___ Go to gulfbank.com and click "Sign Up". Complete the "First Time Login" page to enroll
- ___ Print out a list of all your Bill Payments set up at your current bank
- ___ Enter Bill Payments into your Online Banking account with Gulf Coast Bank

___ **Enroll in eStatements**

- ___ Go to gulfbank.com and select "eBanking", then select eStatements

___ **Fund your Gulf Coast Bank Account – two options**

- ___ Deposit a check from your former bank
- ___ Enroll and use Account to Account transfers inside Bill Pay to move money electronically to your new Gulf Coast Bank Account

___ **Redirect your Direct Deposit**

- ___ Notify your employer or Social Security Administration to redirect your payroll or benefits using the easy to use attached form.
Note: if you are currently receiving Social Security Benefits through direct deposit contact Social Security toll free at 1-800-772-1213 to notify them of your new account.

___ **Redirect your ACH billing companies (such as your auto loan, electricity company, mortgage company) to switch your withdrawal to your new account using the easy to use attached form.**

___ **Close your Old Account**

- ___ Verify that all checks have cleared your old account
- ___ Remove all funds from your old account
- ___ Verify that your Direct Deposit has been redirected
- ___ Send a close account letter to your old bank
- ___ Destroy all checks, deposit slips and debit cards associated with your old account

WELCOME – We are glad to have you as part of our Gulf Coast Family.



Direct Deposit Letter

Company Name

Address

RE: Initiate/Switch My Direct Deposit to a New Financial Institution

Dear Sir or Madam,

I would like to initiate/switch my direct deposit to my Gulf Coast Bank account. If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

AUTHORIZED SIGNATURE

(Original signature required to authorize change)

DATE

Direct Deposit Information

Customer name as it appears on company's records – please print

Type of account: Payroll Social Security Retirement Dividend Payment Other

Social Security Number/Employee Number

Phone Number

Address

City

State

Zip

Former Bank Name

Checking

Savings

Routing Number

Former Bank Account Number

Checking

Savings

Amount Deposited

Additional Account Number

Amount Deposited

Gulf Coast Bank

265070435

New Bank Name

Checking

Savings

Routing Number

New Bank Account Number

Checking

Savings

Amount Deposited

Additional Account Number

Amount Deposited



Automatic Payments Letter

Company Name

Address

RE: Switching my automatic payments

Dear Sir or Madam,

I have recently changed banks and would like to have my automatic payments with your company changed to my new account. I have enclosed a cancelled check with my new Gulf Coast Bank account information for your reference. Please discontinue transactions from my old account and begin using my new Gulf Coast Bank account.

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

AUTHORIZED SIGNATURE

(Original signature required to authorize change)

DATE

Automatic Payment Information

Customer name as it appears on company's records – please print

Phone Number

Account Number with Your Company

Address

City

State Zip

Amount Debited (enter payment amount or "amount due")

Former Bank Name

- Checking
 Savings

Routing Number

Former Bank Account Number

For:

On:

Type of Payment / Reason for Payment / Date of Payment

Gulf Coast Bank

265070435

New Bank Name

- Checking
 Savings

Routing Number

New Bank Account Number



Account Closing Letter

Company Name

Address

RE: Closing my account(s)

Dear Sir or Madam,

This letter is to inform you that I am closing my accounts at your bank. Please close the following account(s) listed below and send a check for the remaining balance(s) to my address.

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Sincerely,

AUTHORIZED SIGNATURE
(Original signature required to authorize change)

DATE

Account Closing Information

Checking Account Number

Savings Account Number

Overdraft Protection Account Number

Amount Debited (enter payment amount or "amount due")

Name as it appears on account(s) – please print

Former Bank Account Number

Type of Payment / Reason for Payment / Date of Payment

Gulf Coast Bank

265070435

New Bank Name

- Checking
 Savings

Routing Number

New Bank Account Number