

# Switch to Planters - Checklist



We'll help make moving your account to Planters Bank easy and convenient! Refer to the checklist below for account information and let us help you make your move to Planters Bank!

- To close an account and transfer any remaining funds, you will need instructions from your current bank.**
  - o Remember to make sure all checks have cleared on your old account!
  - o Verify all direct deposits and automatic payments have started from your new Planters Bank account.
  
- To change your payroll or direct deposit, you will need:**
  - o Old account number/recent bank statement
  - o New Planters Bank account number
    - Checking: \_\_\_\_\_
    - Savings: \_\_\_\_\_
    - Other: \_\_\_\_\_
  - o Planters Bank Routing #: 083902633
  - o A voided Planters Bank check
  
- To change your Social Security Direct Deposit, you will need:**
  - o New Planters Bank account number
    - Checking: \_\_\_\_\_
    - Savings: \_\_\_\_\_
    - Other: \_\_\_\_\_
  - o Planters Bank Routing #: 083902633
  - o Visit <http://www.ssa.gov/deposit/howtosign.htm> to change your deposit online or print out the government's Standard Form 1199A (also available from Planters Bank), or call 1-800-772-1213. We'll make the call with you when you visit us to open your account!
  
- To change an automatic payment or withdrawal, you will need:**
  - o Recent statement from vendor or recent bank statement
  - o New Planters Bank account number
    - Checking: \_\_\_\_\_
    - Savings: \_\_\_\_\_
    - Other: \_\_\_\_\_
  - o Planters Bank Routing #: 083902633
  - o We'll make the call to the vendor with you when you visit us to open your account.
  
- To discuss transferring an existing loan, you will need:**
  - o Recent loan statement with loan account number and balance remaining
  
- To transfer a 401K (or other retirement account) account, you will need:**
  - o Recent account statement
  - o Contact information for your employer or former employer
  - o New Planters Bank account number
    - Checking: \_\_\_\_\_
    - Savings: \_\_\_\_\_
    - Other: \_\_\_\_\_

[www.plantersbankonline.com](http://www.plantersbankonline.com) | 888.806.7036

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