



## MAKE THE SWITCH TO GREEN BANK

Looking for a convenient, hassle free way to switch banks? Switching to Green Bank has never been easier.

All the forms you'll need to switch your accounts, your automatic transfers and payments and your direct deposits are all right here. Even closing out your existing account can be easy!

### Here is the information we'll need from you to make the switch:

- Name(s) as listed on current accounts
- Physical address (no P.O. Boxes)
- Social Security number(s) / TIN
- Date of Birth
- Government picture ID
- Name of your current financial institution
- List of all direct deposits, automatic deposits, automatic payments and/or automatic transfers
- Your most recent bank statement
- Copies of bills that are automatically drafted from your accounts (if any)

### Three simple steps to make the switch:

#### Step 1: Choose your Branch Location *(view location list on last page)*

Meet your personal banker and set up your new Green Bank accounts

#### Step 2: Change your Automatic Payments and Deposits

##### **Automatic Transfers**

Change your automatic transfers to your new Green Bank accounts

##### **Direct Deposits**

Change your direct deposits to your new Green Bank accounts

##### **Automatic Payments**

Change you automatic payments and drafts to your new Green Bank accounts

#### Step 3: Close your existing accounts

Close your checking and savings accounts at your former bank. Keep track of everything you need to switch to Green Bank with our Switch Checklist



## Request an Approval to Change Automatic Transfer

Print and complete a copy of this form to notify any banks or companies that you are authorizing your automatic transfer to your new Green Bank account (example: loan payment, insurance payment, transfer to brokerage accounts, transfers to savings accounts, etc.).

**This form is recommended for fixed dollar amount transfers.**

You are currently making the following automatic transfer on my behalf: \$ \_\_\_\_\_

**From**

Name of Bank or Company \_\_\_\_\_

Account Number \_\_\_\_\_

**To**

Name of Institution \_\_\_\_\_

Account Number \_\_\_\_\_

Schedule/Frequency \_\_\_\_\_

**Please use this letter as my authorization to switch the transfer to the account listed below at Green Bank.**

Institution Green Bank

Routing Number 113024164

Account Number \_\_\_\_\_

**All other aspects of the transfer should remain the same.**

Please make this change effective as of (date): \_\_\_\_\_

If you need additional information to complete this change,

I can be contacted at (phone) \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_



## Authorization to Change Direct Deposit/Automatic Deposits

Print and complete a copy of this form for each depositor with whom you have arranged for direct deposit to notify them that you are authorizing the direct deposit to be made to your new Green Bank account (example: payroll, dividends, royalties, etc.).

Please allow sufficient time for this change to be reflected.

My checking account at the following financial institution has been closed:

Name of former Financial Institution \_\_\_\_\_

Previous ABA Routing Number \_\_\_\_\_

Previous Account Number \_\_\_\_\_

Name(s) on Account \_\_\_\_\_

Social Security Number \_\_\_\_\_

**Please establish direct deposit into my Green Bank checking account.**

Green Bank ABA Routing Number: 113024164

My New Green Bank Account Number \_\_\_\_\_

I have enclosed a deposit slip to verify my new Green Bank account number.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_



## Authorization to Change Automatic Payments/Drafts

Complete this form to cancel automatic payments/drafts (ex: utilities, telephone, etc.) that you make from your former bank account. Print as many copies of this form as you need and mail one to each of the companies with which you have an automatic payment/draft before your next payment is due.

Please allow sufficient time for this change to be reflected.

**This form is recommended for fixed dollar amount transfers.**

My checking account at the following financial institution has been closed:

Name of former Financial Institution \_\_\_\_\_

Previous ABA Routing Number \_\_\_\_\_

Previous Account Number \_\_\_\_\_

Name(s) on Account \_\_\_\_\_

Social Security Number \_\_\_\_\_

**I authorize automatic payment/draft from my new checking account at Green Bank.**

Company to receive this form \_\_\_\_\_

My/our account number at this company \_\_\_\_\_

Green Bank ABA Routing Number: 113024164

My New Green Bank Account Number \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Daytime Phone Number \_\_\_\_\_



## Authorization to Close Account

Complete this form and mail it to your former bank to notify them that you are closing your account and would like to receive a check for the remaining balance.

Please allow time for direct deposits or checks that may already be in process.

Print and complete a copy of this form for each checking or savings account that you have at your existing bank.

Please close my account at:

Name of Former Financial Institution \_\_\_\_\_

Account Number \_\_\_\_\_

Name on Account \_\_\_\_\_

Secondary Name on Account \_\_\_\_\_

Social Security Number \_\_\_\_\_

Please send a check payable to me/us for the remaining balance in the above-described account directly to me/us at this address:

Address \_\_\_\_\_

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

**Please arrange for a direct deposit into my Green Bank checking account.**

Green Bank ABA Routing Number: 113024164

My New Green Bank Account Number \_\_\_\_\_

I have enclosed a deposit slip to verify my new Green Bank account number.

Signature \_\_\_\_\_

Date \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_



## SWITCH CHECKLIST

To ensure a smooth transition, please take a moment to review this checklist and make sure you've covered everything you need to begin your relationship with Green Bank.

### Did you...

#### Choose your Branch location?

##### My Branch Information

Branch Name \_\_\_\_\_

Address \_\_\_\_\_

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

Phone \_\_\_\_\_

#### Met your personal banker and set up your new Green Bank accounts?

My personal banker is \_\_\_\_\_

#### Close your checking and savings accounts at your former bank?

#### Change your automatic transfers to your new Green Bank accounts?

#### Change your direct deposits to your new Green Bank accounts?

#### Change your automatic payments and drafts to your new Green Bank accounts?

WELCOME TO





## **AUSTIN**

### **Hartland Plaza**

1717 West 6th Street, Ste. 110  
Austin, TX 78703  
t: 512.617.6850  
f: 512.617.6859

## **DALLAS**

### **Preston Center**

4029 Northwest Parkway  
Dallas, TX 75225  
t: 972.528.6720  
f: 972.528.6729

### **Uptown**

2408 Cedar Springs Rd.  
Dallas, TX 75201  
t: 972.528.6740  
f: 972.528.6749

### **Addison**

16771 Dallas Parkway  
Addison, TX 75001  
t: 972.707.4120  
f: 972.707.4129

### **Richardson**

1301 E. Campbell Rd.  
Richardson, TX 75081  
t: 972.528.6780  
f: 972.528.6789

### **Plano**

5224 W. Plano Parkway  
Plano, TX 75093  
t: 972.931.5311 or 800.352.8257  
f: 972.931.6401

### **Frito Lay Headquarters, Plano**

7701 Legacy Dr.  
Plano, TX 75024  
t: 972.334.3882  
f: 972.334.6004

## **HOUSTON**

### **Greenbriar - Headquarters**

4000 Greenbriar  
Houston, TX 77098  
t: 713.275.8370  
f: 713.275.8371

### **Houstonian**

109 North Post Oak Lane, Ste. 100  
Houston, TX 77024  
t: 713.316.7050  
f: 713.316.3666

### **Tanglewood**

5018 San Felipe, Ste. D  
Houston, TX 77056  
t: 713.316.7000  
f: 713.316.7001

### **The Woodlands**

1455 Research Forest Dr.  
Shenandoah, TX 77380  
t: 713.275.8270  
f: 713.275.8271

### **Kingwood**

1102 Kingwood Dr.  
Kingwood, TX 77339  
t: 713.275.8320  
f: 713.275.8329

### **Cleveland**

908 E. Houston St.  
Cleveland, TX 77327  
t: 713.275.8350  
f: 713.275.8359

### **Memorial Motor Bank**

8611 Memorial Dr.  
Houston, TX 77024  
t: 713.316.7080  
f: 713.316.7081

## **LOUISVILLE, KY**

### **YUM! Brands Headquarters**

1900 Colonel Sanders Lane  
Louisville, KY 40213  
t: 502.874.2408  
f: 502.874.8728