



GO GREEN! Switch Kit

Welcome to 3rd Federal Bank!

We know that you have choices in banking, and we are pleased that you selected the Green Team to help you meet your financial goals.

The GO GREEN! Switch Kit has been designed to help you make a quick and easy transition to your new account(s) with 3rd Federal Bank. The switch kit contains everything you need to get started:

- worksheets on which to gather all the necessary financial information
 - personal information for your new account
 - previous financial institution information
 - accounts and services in which you are interested
 - direct deposit information
 - automatic payments information
 - online bill pay data
- direct deposit authorization form
- change automatic payments authorization form
- close account request and authorization form

Simply print the GO GREEN! Switch Kit and complete the information and forms as applicable to your needs. Once you're done, bring your complete GO GREEN! Switch Kit to a 3rd Federal branch office near you, and a Green Team member will promptly assist you in getting your account(s) opened.



GO GREEN! Switch Kit

Personal Information for Your Account

Type of Account Requested*

Individual Account

Joint Account

Primary Account Holder

Name

Address

City, State Zip

Home Phone

Work Phone

Email

Social Security Number

Driver's License Number/State

DL Issue Date

DL Exp Date

Date of Birth (mm/dd/yyyy)

Second ID

Mother's Maiden Name

Employer

Spouse

Joint Account Holder (if applicable)

Name

Address

City, State Zip

Home Phone

Work Phone

Email

Social Security Number

Driver's License Number/State

DL Issue Date

DL Exp Date

Date of Birth (mm/dd/yyyy)

Second ID

Mother's Maiden Name

Employer

Spouse

Previous Financial Institution Information

Previous financial institution

Account Type*

ACCT #

Account Type*

ACCT #

Account Type*

ACCT #

Account Type*

ACCT #

Account Type*

ACCT #

Account Type*

ACCT #

*Type = checking, savings, money market, CD, loan, etc.



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Accounts and Services

Please indicate accounts and services in which you are interested.

- | | | |
|--|---|---|
| <input type="checkbox"/> Checking accounts | <input type="checkbox"/> Vactaion/holiday club | <input type="checkbox"/> Home equity loan |
| <input type="checkbox"/> Savings accounts | <input type="checkbox"/> ATM/Visa check card | <input type="checkbox"/> Home equity line of credit |
| <input type="checkbox"/> Youth savings accounts | <input type="checkbox"/> Online banking and GreenPay | <input type="checkbox"/> Personal loan |
| <input type="checkbox"/> Money market accounts | <input type="checkbox"/> Greenline Banking--telephone | <input type="checkbox"/> Refinance solutions |
| <input type="checkbox"/> Certificates of deposit | <input type="checkbox"/> Visa Platinum credit card | <input type="checkbox"/> Mortgage loan |
| <input type="checkbox"/> IRA products | <input type="checkbox"/> Promotional offers | <input type="checkbox"/> First-time homebuyer program |

Direct Deposit Information

Direct deposit is the easiest way to have SAME DAY access to your money. Complete the information below and the Green Team can help you transfer or initiate your direct deposit.

- Type of check
- | | |
|---|---|
| <input type="checkbox"/> Employer payroll | <input type="checkbox"/> Social Security |
| <input type="checkbox"/> Pension | <input type="checkbox"/> Supplemental security income |
| <input type="checkbox"/> Other _____ | |

Employer name _____ ID # _____

Employer address _____

Previous Bank _____

Routing # _____ Account # _____

Automatic Payment Information

If you currently have automatic payments scheduled from your account(s), (i.e. mortgage, insurance, credit cards), complete the information below and the Green Team will provide you with the necessary paperwork to transfer or initiate your automatic payments. Please note, this does not include online bill payments; see separate section.

Company name _____	Account # _____	Amount \$ _____
Address _____		
Company Name _____	Account # _____	Amount \$ _____
Address _____		
Company Name _____	Account # _____	Amount \$ _____
Address _____		



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Online Bill Pay Information

Online banking is the easiest way to manage your money. 3rd Federal Bank offers a state-of-the-art FREE online banking system, including FREE Online Bill Pay service. You can schedule payments up to a year in advance and you can export your bill payment activity directly into your Microsoft Money or Quicken software.

Whether you need to transfer your payments from your previous financial institution or you simply want to get started, the convenient worksheet below will help you get all of your information in one place. Then, when you are ready switch to 3rd Federal's online banking, including FREE Online Bill Pay, you will be ready to go.

Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone
Company name	Account #	Amount \$
Address		Phone



Direct Deposit Authorization

To: _____
(Company Name/Employer)

I authorize you to electronically deposit my net pay each payday into my 3rd Federal Bank account listed below.

Type of account Checking Savings

Account Number _____ Routing/ABA Number **231372183**

Please use my following personal information and signature as authorization, or to contact me with any questions.

Full Name _____

Street Address _____

City _____ State _____ Zip Code _____

Daytime Phone Number _____ Social Security Number _____

Employee Number (if applicable) _____

Signature (required) _____ Date _____

Attach a 3rd Federal Bank voided check or withdrawal slip (do not staple deposit slip) to this completed form and mail or hand-in to your company's payroll department. Be sure to verify when your direct deposit authorization will be in effect so you can plan accordingly.



Change Automatic Payments Authorization

To whom it may concern:

This letter is to authorize the change of my automatic payments from my previous checking account to my new 3rd Federal Bank checking account. Below is the information necessary to fulfill this request:

This is in reference to the account I hold with your company:

Company Name

My Account Number (if applicable)

My Name

My Address

City

State

Zip Code

Daytime Phone Number

Please discontinue making payments from my previous account as follows:

Previous Financial Institution's Name

Account Number

Routing/ABA Number

I hereby authorize any and all future automatic payments to be taken from my new 3rd Federal Bank checking account as follows:

My new 3rd Federal Account Number

3rd Federal's Routing/ABA Number **231372183**

Please send me written confirmation as to when the change will be effective. Thank you.

Signature (required)

Date



Close Account Request and Authorization

To whom it may concern:

I hereby request that you close the following bank account I maintain with your bank:

Bank Name

My Account Number

Primary Name on Account

Secondary Name on Account

Please forward all funds remaining in the account to my attention at:

My Name

Bank Name

Bank Address

City

State

Zip Code

My Daytime Phone Number

If you have any questions, please contact me at the above daytime phone number.
Thank you.

Sincerely,

Signature (required)

Date
