



FEDERAL BANK

Get a real bank. GO GREEN!

3 Penns Trail • Newtown, PA 18940
1.888.918.4473

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

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

Simply print the **GO GREEN! Business Switch Kit** and complete the information and forms as applicable to your needs. Once you're done, bring your complete **GO GREEN! Business 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! Business Switch Kit

Business Information for Your Account

Business Name _____ Business Type Sole Proprietorship
 Address _____ Partnership
 City _____ State _____ Zip _____ Corporation
 Employer Identification Number (EIN) _____
 Business Phone _____ Business Cell Phone _____
 Email Address _____
 Web Site _____ Fax Number _____
 Authorized Signer Name _____
 DL # _____ State _____ Exp. Date _____ Date of Birth _____
 Authorized Signer Name _____
 DL # _____ State _____ Exp. Date _____ Date of Birth _____
 Authorized Signer Name _____
 DL # _____ State _____ Exp. Date _____ Date of Birth _____
 Authorized Signer Name _____
 DL # _____ State _____ Exp. Date _____ Date of Birth _____

We will need you to provide a copy of business registration, i.e., Fictitious Name Registration, Limited Partnership, LLC Registration or Incorporation Documents upon your first branch visit.

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"/> Business checking accounts | <input type="checkbox"/> ATM/Visa® check card | <input type="checkbox"/> Commercial loan |
| <input type="checkbox"/> Business savings accounts | <input type="checkbox"/> Business online banking and GreenPay | <input type="checkbox"/> Commercial line of credit |
| <input type="checkbox"/> Business money market accounts | <input type="checkbox"/> Cash management | <input type="checkbox"/> Term loans |
| <input type="checkbox"/> Personal checking accounts | <input type="checkbox"/> Greenline banking—telephone | <input type="checkbox"/> Equipment loans |
| <input type="checkbox"/> Certificates of deposit | <input type="checkbox"/> Consumer loans and mortgages | <input type="checkbox"/> Commercial mortgages |
| <input type="checkbox"/> IRA products | <input type="checkbox"/> Promotional offers | <input type="checkbox"/> Construction loans |

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

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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 _____

Date _____