

SIMPLE SWITCH

We're here to help you save time & Spend Life Wisely. Strength, stability, great products and services and great people...just a few of the many reasons many are switching to First United Bank. Save time, money, and manage your accounts more easily by beginning a relationship with us. Switching is easier than ever with Simple Switch, just follow the 3 easy steps to open your account today!

1 **Open your account.**

- Call 800-924-4427 to schedule an appointment with a Switch Consultant or visit a Community Bank to open your new account.
- Once your account is open, enroll in online banking.

2 **Switch your Direct Deposit(s), Automatic Transaction(s) and Bill Payees.**

- **Direct Deposit Authorization Form:** Use this form to switch any Direct Deposits to your new account at First United.
- **Automatic Withdrawal Authorization Form:** Use this form to switch any automatic withdrawals to your new account.
- **Bill Pay:** Once you have enrolled in our online banking service, you can switch over your payees.

3 **Close your old account:**

- **Account Closure Authorization Form:** Use this form to authorize the closure of your old account. Verify that all your automatic transactions have been switched to your new account and any outstanding checks have cleared and have the remaining balance (if any) sent to you or to your new account at First United Bank.

**SIMPLE
SWITCH.
IT'S NEVER
BEEN EASIER.**

**Contact one of our
Switch Consultants today at
800-924-4427 or visit us at a
Community Bank to begin
your relationship with
First United Bank.**



BANKING

MORTGAGE

INSURANCE

INVESTMENTS

DIRECT DEPOSIT AUTHORIZATION

Make your money automatic, use direct deposit.

This form can be used to authorize your employer, retirement and pension funds, or any other depositing agencies to deposit directly into your First United Bank account. Use one form for each Direct Deposit, make copies as needed.

Notification of Direct Deposit Authorization Change

Employer:

Address:

City, State, Zip:

Phone Number:

Employee ID:
if applicable

- Effective immediately, please deposit the **NET AMOUNT OF MY CHECK** to my First United Bank account. **-OR-**
- Effective immediately, please deposit to my First United Bank account.

I authorize to automatically deposit funds into the account below. This authorization shall remain in place until I have submitted a new authorization, or until this authorization is changed or revoked by me in writing.

Place an X next to your desired option. Be sure to include your account number and ABA/Routing Number. You may also attach a voided check to this form from your new First United Bank account.

- Net amount to First United Bank checking. Specified amount to First United Bank checking.

Account #:

ABA/Routing #:

- Net amount to First United Bank savings. Specified amount to First United Bank savings.

Account #:

ABA/Routing #:

Signature:

Please Print
Name:

Address:

City, State, Zip:

Phone Number:

Direct Deposit is a secure, fast, and convenient way to have your money automatically deposited into your First United Bank account.

Three Easy Steps:

- 1 Fill out this form. This form contains interactive fields for convenience or you can print it and fill it out.
- 2 Provide your new First United Bank account number. You can also attach a voided check to confirm your account number and ABA/Routing number.
- 3 Submit this form to your employer or any other agency that deposits directly to your bank account.

Direct Deposit Checklist:

- Employee Payroll
- Investment Income
- Pension/Retirement Income
- Social Security Administration*
- Other

*Social Security Administration or Social Security Insurance payments may require you to contact Social Security Administration directly at 1 (800) 772-1213



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AUTOMATIC WITHDRAWAL AUTHORIZATION

This form can be used to authorize a change to any automatic withdrawals or deductions such as your mortgage company, auto insurance, or health club membership fees. Use one form for each automatic withdrawal, make copies as needed. **Note:** *If you have used your debit credit card for automatic withdrawals you will need to contact these companies and provide them with your new First United Bank debit or credit card.*



Notification of Automatic Withdrawal Authorization Change

To Whom It May Concern:

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone:

Please discontinue my automatic withdrawal from the following account:

OLD FINANCIAL INSTITUTION:

Account #: ABA/Routing #:

Please make all future automatic withdrawals from the following account:

FINANCIAL INSTITUTION:

Account #: ABA/Routing #:

Thank you very much. *This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.*

Signature:

Please Print
Name:

Address:

City, State, Zip:

Phone Number:

As an alternative to automatic withdrawals, use our free Online Banking Bill Pay. You have the control directly from a secure online banking session.

Three Easy Steps:

- 1 Fill out this form. This form contains interactive fields for convenience or you can print it and fill it out.
- 2 Provide your new First United Bank account number. You can also attach a voided check to confirm your account number and ABA/Routing number.
- 3 Submit this form to any company that withdraws funds automatically from your account.

Automatic Withdrawal Checklist:

- Cable
- Cell Phone
- Credit Card
- Health Club
- Other



ACCOUNT CLOSURE AUTHORIZATION

This form can be used to authorize the closure of your account at your previous financial institution. You can authorize that your remaining balance be deposited electronically to your account (if available) or have a check forwarded to your mailing address. Be sure to verify that any outstanding items have cleared and your direct deposits or automatic withdrawals (if applicable) have switched over to your new account.



Notification of Account Closure Authorization

To Whom It May Concern:

Financial Institution:

Address:

City, State, Zip:

Please close my account:

Account Number:

Primary Owner:

Address:

City, State, Zip:

Please send the remaining balance to:

Place an X next to your desired option. Have your funds deposited electronically (if available) or have a check forwarded to your mailing address.

Please deposit directly to my new account FIRST UNITED BANK.

Account #:

ABA/Routing #:

Please forward me a check to my address listed below.

If you have any questions, please call me at the number below. Thank you very much.

Primary Signature:

Date:

Joint Signature:

Date:

Please Print

Name:

Address:

City, State, Zip:

Phone Number:

Once all your items have cleared and your direct deposits or automatic withdrawals have switched, be sure to close your old account.

Three Easy Steps:

- 1 Fill out this form. This form contains interactive fields for convenience or you can print it and fill it out.
- 2 Provide your new First United Bank account number. You can also attach a voided check to confirm your account number and ABA/Routing number.
- 3 Submit this form to the financial institution where you will be closing your account.



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