HOMETOWN National Bank

Member FDIC EQUAL HOUSING LENDER

SWITCH KIT

SWITCH TO HOMETOWN

1. Contact Cash Management Specialist

CM Specialist will review current bank statements and submit a proposal to you and your team. This ensures for a smooth transition.

2. Open your Hometown Accounts

Order your checks, set up online banking and any additional products and services. This ensures everything your company's needs are in place when you go to transition your accounts.

3. Begin making deposits into new accounts

Start using the accounts right away, even if it is only minimally. Having funds in the account allows for auto-debits to begin to transition.

4. Set a target date to have accounts fully transitioned

Giving yourself a deadline. Choose a date that works best for your company to have everything fully transitioned.

5. Contact third-party payroll service provider

When your new accounts are opened, the CM Specialist will provide an Account Verification Letter. It is important to get this to any third party you may be using as these companies typically take longer to transition.

6. Start auto-deposits by transition date

Create a list of all your auto-deposits, contact them with your target date of charge.

7. Contact all auto-debits with date of change

Create a list of all your auto-debits, contact them with your target date of charge.

8. Close your old accounts

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