



# SWITCH KIT



**Kennebec  
Savings Bank**

# MAKING THE SWITCH

## Switching to Kennebec Savings Bank has never been easier.

Follow these simple 4-step instructions, and you'll be banking where you and your community come first in no time at all!

**Step 1.** Open a Kennebec Savings Bank deposit account.

**Step 2.** Change your direct deposits.

**Step 3.** Change your automatic payments.

**Step 4.** Close your old account(s).

## There is no need to do the work of switching on your own.

Visit one of our branches and ask to speak with one of our Customer Service Representatives. We will not only guide you through the process of opening a new account – we would be happy to assist you with the rest of the switch as well, including calling direct depositors with you, mailing forms, and more.

### Augusta

150 State Street  
Augusta, ME 04330  
(207) 622-5801

### Farmingdale

1 Northern Avenue  
Farmingdale, ME 04344  
(207) 588-5801

### Freeport

181 Lower Main Street  
Freeport, ME 04032  
(207) 865-1550

### Portland

53 Baxter Boulevard  
Portland, ME 04101  
(207) 331-5801

### Waterville Main Street

226 Main Street  
Waterville, ME 04901  
(207) 872-5563

### Waterville Washington Street

11 Washington Street  
Waterville, ME 04901  
(207) 873-3539

### Winthrop

84 Main Street  
Winthrop, ME 04364  
(207) 377-5801

## What you will need

- Valid driver's license or other official ID
- Proof of your current address (if not on ID)
- Your funding deposit
- Your Social Security number

## What may be nice to have

- A recent checking account statement
- A list of written outstanding checks
- A list of authorized account withdrawals
- Your employer's direct deposit change form

### 1 Open a Kennebec Savings Bank deposit account.

Open your account online at [Open.KennebecSavings.Bank](http://Open.KennebecSavings.Bank) or in a branch with us. While we open your checking account, be sure to request your accompanying Kennebec Savings Bank debit card or inquire about a credit card. Sign up for Online Banking and get a walkthrough of Mobile Banking, Bill Pay, and eStatements. Check to see if any safe deposit boxes are available. See what we are currently offering for savings CD rates – or our mortgage rates if homeownership or refinancing is in your near future!

### 2 Change your direct deposits.

If you don't have an official direct deposit change form handy, try our notice below!\* Complete and submit this notice to anyone who makes direct deposits to your account. This may include, but is not limited to:

- Employers
- Social Security or other gov't agencies
- Maine Child Support
- Investment managers

### 3 Change your automatic payments.

Use the template provided in this guide to submit automatic payment change notices.\* Complete and submit this to any organization that collects automatic payments or authorized withdrawals from your account. This may include, but is not limited to:

- Housing: mortgage payments or rent, utilities (electric, gas, water), association fees
- Loans: credit cards, auto loans, student loans
- Services: internet, phone, cable/satellite TV
- Subscriptions: Netflix, Amazon Prime, gym, club, or other membership dues
- Miscellaneous: insurance, brokerage accounts, or charitable contributions

### 4 Close your old account(s).

Once any outstanding checks and other items have cleared, and direct deposits and automatic payments are set up to go through your new Kennebec Savings Bank account, write a check from your old account for the remaining balance and contact your old financial institution to close your account. Or, submit a notice of account closure to them as provided in this guide.\*

*\*Note: You may be required by these recipients to submit additional forms. In other instances, we may be aware of processes that can help simplify the switch even more than we have outlined here. We are happy to help as we can, don't be afraid to ask!*



## Direct Deposit Change Notice

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*Name*

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*Social Security Number*

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*Employer*

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*Daytime Phone Number*

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*Address*

Please accept this as authorization to switch my direct deposit to the following account, effective immediately.

**Kennebec Savings Bank**

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**211274421**

*Bank Name*

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*Account Number*

*Routing Number*

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*Signature*

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*Date*

## Automatic Payment Change Notice

\_\_\_\_\_  
*Name*

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

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

Please accept this as authorization to debit future payments from the following account, effective immediately.

**Kennebec Savings Bank**

\_\_\_\_\_  
*Bank Name*

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

**211274421**

\_\_\_\_\_  
*Routing Number*

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*

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## Account Closure Notice

\_\_\_\_\_  
*Name*

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

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

Please accept this as authorization to close the following account(s), and send a check payable to me for the remaining balances to:

Kennebec Savings Bank, PO Box 50, Augusta, ME 04332

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

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

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

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

Please insert my new account number in the memo line: \_\_\_\_\_.

\_\_\_\_\_  
*Signature*

\_\_\_\_\_  
*Date*