

First State Bank

Purdy, Monett, Pierce City, Cassville

Everything you need to switch your account to First State. Please follow the steps to guide you through the process of switching your checking account to First State Bank.

1. **Open a First State Bank checking account** – First State Bank offers various checking accounts to fit your financial style. The following services are FREE for all First State Bank checking accounts: MasterCard® MasterMoney Debit Card, Online Banking, eStatements, eDeposits, Account Alerts, Telephone Banking, and ATM withdrawals at First State Bank ATMs. Other premium services include Merchant Capture, Online Bill Payment, Online Cash Management, Positive Pay Fraud Prevention, C.D. Statement Delivery, and much more.
 - Free Checking with no monthly service fee; minimum balance \$500
 - Club Checking with free checks, free money orders, AD&D insurance, and more
 - Interest Checking with minimum average ledger balance \$1,000
2. **What you'll need** – Make sure you bring the following items to simplify your account opening process:
 - ☐ Driver's License
 - ☐ Social Security Card
 - ☐ Utility Bill or other Account Statement
3. **Balance and discontinue use of your checking account** – Don't forget to leave enough money to cover any outstanding checks, debit card transactions and scheduled bill payments.
4. **Switch your Direct Deposits** – Switch all direct deposits you have by notifying any third party creditor. Ask us, we may be able to help! This may include:
 - ☐ Your employer
 - ☐ Government Deposit (i.e., Social Security, Pension, Retirement)
 - ☐ Brokerage Deposits (i.e., dividends, interest)
 - ☐ Transfers from other financial institution accounts (i.e., savings, checking, money market)
 - ☐ Child Support or other court-issued deposits
5. **Switch your Automatic and Online Payments** – switch all automatic payments/withdrawals you may have by contacting the company you are paying, and give them your new First State Bank of Purdy checking account information. This may include:

First State Bank Checking Account # _____

Utilities

- ☐ Gas
- ☐ Electric
- ☐ Phone Service
- ☐ Water
- ☐ Trash
- ☐ Pest Control
- ☐ Yard Maintenance
- ☐ Other

Other Payments

- ☐ Loans (i.e., car, home equity, credit card)
- ☐ Mortgages
- ☐ Child Support or court-issued payments
- ☐ Brokerage – automatic investments
- ☐ Account transfers to other bank accounts
- ☐ Insurance (i.e., home, auto, renters)
- ☐ Internet Service
- ☐ Cellular Service
- ☐ Cable / Satellite
- ☐ Other

6. **Close your old account** – Once all of the outstanding payments and deposits have cleared your old account and you are sure there will be no further activity, deposit the balance into your First State Bank account. Notify your old bank where to send any remaining balances.
7. **Enjoy your new account** – Don't forget to visit any of our five branch locations, or online at www.fsb-purdy.com to learn about all of our valuable products and services.

CUSTOMER INFORMATION SHEET**Primary Account Holder**

Name:

Street Address:

City:

State:

Zip:

Home Phone:

Work Phone:

Cell Phone:

Driver's License #:

DL Expiration:

Employer:

Position/Title:

Email Address:

Joint Account Holder (if applicable)

Name:

Street Address:

City:

State:

Zip:

Home Phone:

Work Phone:

Cell Phone:

Driver's License #:

DL Expiration:

Employer:

Position/Title:

Email Address:

Accounts & Services

Accounts and Services that you are currently interested in:

- | | | |
|--|---|---|
| <input type="checkbox"/> Regular Checking | <input type="checkbox"/> Safe Deposit Box | <input type="checkbox"/> Agriculture Loan |
| <input type="checkbox"/> First Club Checking | <input type="checkbox"/> ATM Card | <input type="checkbox"/> Consumer Loan |
| <input type="checkbox"/> Interest Checking | <input type="checkbox"/> MasterMoney Debit Card | <input type="checkbox"/> Mortgage Loan |
| <input type="checkbox"/> Savings Account | <input type="checkbox"/> Online Banking | |
| <input type="checkbox"/> Individual Retirement Account | <input type="checkbox"/> Online Bill Payment | |
| <input type="checkbox"/> Certificate of Deposit | | |