

# Here's how to make the switch:

## **Step 1: Open your new Sentry Bank account**

Fill out the account application form on page 1

## **Step 2: Stop using your old account**

Make sure your account is balanced and has sufficient funds to cover any outstanding payments.

## **Step 3: Switch your automatic deposits and payments**

Use the forms on pages 4 and 5 to inform various service providers of your new account information. You may be able to change your information with some companies via phone or their website.

## **Step 4: Close your old account**

Use the form on page 6 to close your old account.

## **Step 5: Relax and enjoy your Sentry Bank experience**

Check out our website [www.mysentrybank.com](http://www.mysentrybank.com) and sign up for our Internet Banking so that you can see up to the minute information on your account

We make switching easy, because that's the kind of thing friends do.

---

Use the following information to complete the included forms.

Sentry Bank Routing Number: **091909466**

Checking Account Number: \_\_\_\_\_

Savings Account Number: \_\_\_\_\_

Money Market Account Number: \_\_\_\_\_

Loan Account Number: \_\_\_\_\_

Main Branch Address:  
400 4<sup>th</sup> Ave NE  
St Joseph, MN 56374

Mailing Address:  
PO Box 159  
St Joseph, MN 56374

Phone: 320-363-7721  
Fax: 320-363-4816

Website:  
[www.mysentrybank.com](http://www.mysentrybank.com)

## **Step 1: Open your new account**

Complete this form and bring it in to any branch and we will set up your new account in a matter of minutes.

Legal Name (Last, First, Middle) \_\_\_\_\_

Home Address \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_

Own  Rent How Long? \_\_\_ yrs \_\_\_ mos

If less than one year - Previous address: \_\_\_\_\_

Home Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_

Date of Birth \_\_\_\_\_ Social Security Number \_\_\_\_\_

Email \_\_\_\_\_

DL# \_\_\_\_\_ Issue Date \_\_\_\_\_ Exp. Date \_\_\_\_\_

Current Employer \_\_\_\_\_ Occupation \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

Nearest Relative Not Living With You:

Name \_\_\_\_\_ Relation \_\_\_\_\_

Address \_\_\_\_\_ Phone \_\_\_\_\_

By signing below, the undersigned request(s) the described services and agrees to the terms and conditions governing the services, including any fees and charges. The undersigned agree(s) that all information is accurate and authorizes Sentry Bank to verify credit, employment history, identity, credit history and other banking history from a consumer reporting agency, as long as I am an authorized signer on the account. I further understand if information in the credit report results in a decision to either disallow my signing authority on the account or disallow opening the account Sentry Bank will communicate this fact to owners and/or authorized signers of the (proposed) account. I further authorize Sentry Bank to obtain such information at any time from one or more consumer agencies that it may choose as long as I am an authorized signer on the account. I certify that the information provided by me is true and correct to the best of my belief.

Customer Signature \_\_\_\_\_ Date \_\_\_\_\_

## **Step 2: Stop using your old account**

Review the last three months' worth of bank statements and make sure that your current account is balanced and up to date. Look for any outstanding checks that have not been cashed and be sure to leave enough money in the account to cover them when they come through.

Look for any direct deposits that come in and use the form on Page 4 to inform those companies of the account change.

Places that might deposit directly into your account could include:

- Payroll
- Investment Dividends
- Social Security
- Pension Payments

Then look for any payments that are automatically deducted from your account and use the form on page 5 to inform those companies of the account change.

Places that might automatically deduct from your account include:

- Mortgage/Rent
- Cable/Satellite/Internet
- Insurance
- Utilities
- Subscriptions
- Auto Loan
- Phone
- Charitable Giving
- Health Clubs
- Child Care

Use the form on Page 3 to keep track of who you have contacted and then check them off after they have begun using your new account information.



## Direct Deposit Change Request

To whom it may concern:

Please accept this letter as my authorization to transfer my direct deposit to Sentry Bank effective \_\_\_\_\_.

Sentry Bank Routing/ABA Number is **091909466**

My checking account number at Sentry Bank: \_\_\_\_\_

My savings account number at Sentry Bank: \_\_\_\_\_

If you have any questions, please contact me at:

Home: \_\_\_\_\_

Work: \_\_\_\_\_

My Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Thank you.

*This information has been verified by an employee of Sentry Bank*

## Automatic Payment Change Request

To Whom it may concern: \_\_\_\_\_

Please accept this letter as my authorization to transfer my automatic payment to Sentry Bank effective \_\_\_\_\_.

Sentry Bank Routing/ABA Number is **091909466**

My new account number is: \_\_\_\_\_

Type of account: \_\_\_Checking \_\_\_Savings

If you have any questions, please contact me at:

Home: \_\_\_\_\_

Work: \_\_\_\_\_

My Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Thank you.

## **Step 4: Close your old accounts**

Send the form below to your current financial institution, asking them to close your current accounts.

-----

### **Request to Close Checking Account**

To Whom it May Concern:

Please accept this letter as my authorization to close my checking account, number \_\_\_\_\_, effective immediately.

Please send me an official check for the remaining funds to the following address:

\_\_\_\_\_  
Address

\_\_\_\_\_  
City                      State                      Zip

If you have any questions, please contact me at:

Home: \_\_\_\_\_

Work: \_\_\_\_\_

My Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Thank you.