



Guaranty E-Z Switch Checklist

✓ If you haven't done so already, start banking with WGSB!

Complete the **Personal Account Application** and mail to the address below or visit a customer service representative at any of our offices.* He or she will help you choose from WGSB's family of accounts and services to design a package that's right for you. Refer to **Checking, Savings & Extras** for information about account options, as well as our popular companion services. **Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. In most cases, we will also ask to see your driver's license or other identifying documents before opening an account.*

✓ Change direct deposits and automatic payments to your accounts.

It may take a number of weeks for some third parties to make the switch. Be sure to keep an adequate balance in your old *and* new accounts until all electronic deposits/payments have been switched to your account with WGSB.

CHOOSE ONE:

Let us do the paperwork! Use the **Automatic Payment & Deposit Inventory** list to gather the names and addresses of companies you'd like to notify of the change. Include as much information as you can about specific payment/deposit amounts and dates. Consider employers, insurance and utility companies, internet vendors, etc. Then, bring your completed inventory list to any WGSB office or mail to the address below, ATTN: Deposit Services. We'll prepare the various forms for you to sign and take care of the rest!

—OR—

Do-it-yourself. Use the **Authorization to Change Direct Deposit** and the **Authorization to Change Automatic Payment/Deposit** forms, printing additional copies for each company you need to notify. Sign each and mail to the appropriate company.

✓ Close your old accounts.

Once all payments/deposits appear in your new account statement, complete the **Authorization to Close Account** form to close your old account(s), sign, and mail to the appropriate institution.