

# Switching to Home Federal Bank is **Easy!**

## Easy Switch Kit Checklist

Switching your account to Home Federal Bank is just a few steps away. Follow the checklist one step at a time and before you know it you will have made a change that is infinitely BETTER.

### TRANSFER YOUR ACCOUNT TO HOME FEDERAL BANK

Switching to Home Federal Bank is easy. Simply complete the Easy Switch Form on page 2 of your Easy Switch Kit. Return the form to Home Federal Bank using one of 3 options.

BRANCH	MAIL	FAX
Bring the form in to any of our branch locations.	Home Federal Bank Attn: Account Opening PO Box 1728 Shreveport, LA 71166	(318)674-2622

Once Home Federal Bank receives your Easy Switch Form, we will process the application and contact you to arrange a convenient time for you to come into a HFB location to sign paperwork. We will also assist you with completing the rest of the Easy Switch Kit and any other financial services you may need. Please bring your drivers license, the form below filled out with as much information as possible and any direct deposit and/or automatic payments information so we may assist you.

### ORGANIZE DIRECT DEPOSITS AND AUTOMATIC PAYMENTS

We will work with you to transfer your direct deposits and automatic payments to your new account. To help us get started, fill out the direct deposit/automatic payment information sheet on page 3 of your Easy Switch Kit. *Bring this form in when you come in for your appointment.*

### TRANSFER DIRECT DEPOSIT AND AUTOMATIC PAYMENTS TO A HFB ACCOUNT

We will review the direct deposit/automatic payment information sheet and work with you to transfer the transactions listed to your new HFB account.

**Direct Deposit:** Contact the source of your direct deposit about the procedure for changing it to your new account. Each company will have a different time frame for the change to occur, so ask when the transfer will occur. If no exact procedure is necessary, we provide a Direct Deposit Transfer Form on page 4 of your Easy Switch Kit.

**Automatic Payments:** To transfer the transactions, each company may have a specific form to out, allow you to call or use on-line access, or accept the Automatic Payment Transfer Forms provided in your Easy Switch Kit on page 5. After contacting the company, complete the process provided by them to ensure the automatic payment is transferred correctly. Request confirmation of account change for your records and a date the change will occur to verify money will be available in the correct account when the payment is made. *Please continue to watch your old account for any direct deposits or automatic payments that you did not list.*

### CLOSE YOUR OLD ACCOUNT

Ensure you have done the following on your old account before contacting the bank to have it closed:

- Make sure all direct deposit, automatic payments, check, atm/debits, and all other transactions have posted to your old account.
- Ensure that all automatic payments and direct deposits have been transferred to your HFB new account.
- Cancel your debit card and destroy remaining checks from your old account.

Once you have taken care of everything above, contact your old bank to have the account closed. You may use the Close Account Form on page 6 of your Easy Switch Kit, if the bank will accept the account closure in writing. Check back with the bank to ensure the account is closed in approximately a week.

## Easy Switch Form

PRIMARY ACCOUNT HOLDER			
Company			
Address			
City, State, Zip			
Home Phone		Work Phone	
Cell Phone		Driver's License State	
Driver's License #		DL Issue/Expiration Dates	
Employer		Position/Title	
Email Address			

JOINT ACCOUNT HOLDER (If Applicable)			
Company			
Address			
City, State, Zip			
Home Phone		Work Phone	
Cell Phone		Driver's License State	
Driver's License #		DL Issue/Expiration Dates	
Employer		Position/Title	
Email Address			

All of the information I have given is true and correct. I understand that for my protection, new account applications will be verified by EFunds Chex Systems. If more than one person signs below, I understand that this statement applies to both persons.

\_\_\_\_\_  
Primary Applicant Signature

\_\_\_\_\_  
Joint Account Holder Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## Direct Deposit/Automatic Payment Information Sheet

Fill out this information sheet before beginning the process to ensure all of your direct deposits and automatic payments are changed. As you complete each transaction, mark it completed and see how easy it is to switch to Home Federal Bank.

DEPOSITS				
	Company Name/Address	Account Number	Phone	Completed
Payroll				
Payroll				
Pension				
Social Security				
Other				
Other				
Other				
AUTOMATIC PAYMENTS				
	Company Name/Address	Account Number	Phone	Completed
Mortgage				
Car				
Car				
Insurance				
Insurance				
Telephone				
Cell Phone				
Electricity				
Gas				
Water				
Other				
Other				
Other				
Other				

## Direct Deposit Transfer Form

COMPANY INFORMATION	
Company	
Address	
City, State, Zip	
Phone	
INDIVIDUAL INFORMATION (Employee/Recipient of Direct Deposit)	
Name	
Address	
City, State, Zip	
Phone	

**Please Send deposit(s) directly to:**

Home Federal Bank  
624 Market Street  
Shreveport, LA 71101

**Deposit Instructions:**

ABA Routing Number: 311170276

Please make deposit(s) into the following account(s):

Checking	Savings
Full Amount	Partial Amount of \$ _____
Account # _____	
Checking	Savings
Full Amount	Partial Amount of \$ _____
Account # _____	

I hereby authorize the transfer of my direct deposit to Home Federal Bank, and submit this letter as written notification. If you have any questions, please contact me at the number listed above or by mail. Thank you for your prompt assistance in this matter.

Sincerely,

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## Account Payment Transfer Form

CUSTOMER INFORMATION	
Name	
Address	
City, State, Zip	
Phone	
PAYEE INFORMATION	
Name	
Address	
City, State, Zip	
Phone	

**Previous Bank Information:**

Bank Name: \_\_\_\_\_

Routing Number: \_\_\_\_\_

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

**New Bank Information:**

Home Federal Bank

624 Market Street

Shreveport, LA 71101

**New Account Information:**

ABA Routing Number: 311170276

Checking                      Savings

Account # \_\_\_\_\_

I have recently changed banks and would like to have automatic payments with your company transferred to my new account. Effective immediately, I authorize the above payee and Home Federal Bank to initiate transactions to my checking/savings account. If you have any questions regarding this request, please contact me by mail or at the phone number listed above.

Sincerely,

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date

## Close Account Form

CUSTOMER INFORMATION	
Name	
Address	
City, State, Zip	
Phone	
BANK	
Bank	
Address	
City, State, Zip	
Phone	

I hereby request that the following deposit account(s) with you to be closed:

Checking                  Savings                  Other  
Account # \_\_\_\_\_

Checking                  Savings                  Other  
Account # \_\_\_\_\_

Checking                  Savings                  Other  
Account # \_\_\_\_\_

Checking                  Savings                  Other  
Account # \_\_\_\_\_

Checking                  Savings                  Other  
Account # \_\_\_\_\_

Please forward all remaining funds to me by check to the address shown on my account. If for any reason there is a penalty or fee please contact me at the number listed above.

Sincerely,

\_\_\_\_\_  
Authorized Signature

\_\_\_\_\_  
Date