

# MAKING THE SWITCH TO GRUNDY BANK IS AS **EASY** AS 1-2-3!

Are you looking to switch banks or start fresh after a recent move? Look no further! Our community bank is here to guide you every step of the way.

Download our switch kit packet today to get started on your new financial journey.

## VISIT A BRANCH LOCATION TODAY!



815-942-0130



[grundy.bank](http://grundy.bank)



201 Liberty Street, Morris  
120 S. Main Street, Wilmington



Member  
**FDIC**



# Grundy Bank Switch Kit

Thank you for choosing Grundy Bank for your personal banking needs. Changing banks can be a challenge, so we've put some simple steps together to help ease your transition. Just follow these steps and allow us to help you along the way.

## Getting Started....

### 1. Open a new account at Grundy Bank.

Stop in to one of our branches to open your new account. A Client Services Specialist can help advise you on the account(s) and services to fit your needs, or you can visit our website to view our personal products and services at [www.grundy.bank](http://www.grundy.bank). Once you've opened your account, be sure to enroll for Internet Banking at [www.grundy.bank](http://www.grundy.bank) or through our Grundy Bank app. To add bill payment, simply click on the Bill Pay link once enrolled.

### 2. Switch Direct Deposit(s) and Automatic Payment(s)

Direct Deposits from your employer, retirement plan, or other sources of income such as social security or dividends, needs to be transferred to your new account. For your convenience, we've included a Direct Deposit Authorization form to use or you can call them directly. We've included some phone numbers that may be useful or you should be able to locate a customer service number on any of your statements.

Social Security Administration: (800)772-1213

Caterpillar Retirement: (888)614-4328

Teachers Retirement System of the State of IL: (800)877-7896

Automated payments for insurance, utilities and other transactions you have authorized will need to be changed too. If you are currently using Online Bill Payment, don't forget to print a list of your current Payees (and your payment history) before you close your old account. Grundy Bank Online Bill Pay can handle all of the recurring and one-time bill payment needs. Most of your payees will allow you to provide your new account information by telephone or online and should include a customer service number on your statement. If not, we have included an Authorization to Change Automatic Payments form that you can provide to them.

ComEd: (800)334-7661 or [www.comed.com](http://www.comed.com)

Nicor Gas: (888)642-6748 or [www.nicorgas.com](http://www.nicorgas.com)

### 3. Close Your Old Account

Confirm that all outstanding checks have cleared and make sure any transfers of direct deposits and automatic payments have been made to and from your new Grundy Bank account. You can then authorize your old bank to close your account. We have included an Authorization to Close Account form that you can fill out and send to your old bank.

For assistance with any of these forms or questions you may have, please feel free to call one of our Client Services Specialists at (815)942-0130.



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## Direct Deposit Switch Form

Give this form to your employer's payroll department, the agency that issues your government check, and/or any other direct deposit source.

To: \_\_\_\_\_  
Contact Name (if applicable)

At: \_\_\_\_\_  
Employer/Agency Name

**I have opened a new account at Grundy Bank. Please use the information below to switch or set up direct deposit into this new account.**

Employee Name \_\_\_\_\_

Address \_\_\_\_\_

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

**Please begin depositing my check into the following account at Grundy Bank:**

☐ Savings    ☐ Checking

New Account Number \_\_\_\_\_

New Routing Number \_\_\_\_\_

Effective: Immediately Beginning date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date Phone

***Attach a voided check if required by employer or agency.***

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## Automatic Payment Change Form

Complete this form for each automatic payment you currently have scheduled from your former account. Provide a form to each company receiving automatic payments.

To: \_\_\_\_\_  
Contact Name (if applicable)

At: \_\_\_\_\_  
Company Name

**Please change my automatic payment which currently comes out of the following account:**

Former Account Number \_\_\_\_\_

**Please begin taking my automatic payment from my new bank account below:**

☐ Savings    ☐ Checking

New Account Number \_\_\_\_\_

New Routing Number \_\_\_\_\_

Effective: Immediately Beginning date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone



## Account Closing Form

**Complete this form and provide it to the financial institution with your former checking account.**

To: \_\_\_\_\_  
Contact Name (if applicable)

At: \_\_\_\_\_  
Financial institution name (where you have your former account)

**This is my authorization to close the account(s) listed below:**

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

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

Other Account Number \_\_\_\_\_

Other Account Number \_\_\_\_\_

Other Account Number \_\_\_\_\_

Other Account Number \_\_\_\_\_

**Please send a check for remaining balances to me at:**

My Name \_\_\_\_\_

Address \_\_\_\_\_

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

**Thank you for your assistance!**

\_\_\_\_\_  
Customer Signature(s)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Phone

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## Bill Pay Set-Up Form

Use this form to make switching or setting up Online Bill Pay easier.

Who do you need to pay? Enter their information on this chart and use it when setting up your Online Bill Pay service at Grundy Bank.

Biller Name \_\_\_\_\_

Biller Phone \_\_\_\_\_

Biller Address \_\_\_\_\_

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

Biller Name \_\_\_\_\_

Biller Phone \_\_\_\_\_

Biller Address \_\_\_\_\_

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

Biller Name \_\_\_\_\_

Biller Phone \_\_\_\_\_

Biller Address \_\_\_\_\_

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

Biller Name \_\_\_\_\_

Biller Phone \_\_\_\_\_

Biller Address \_\_\_\_\_

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



## Frequently Asked Questions

- **How long will it take for my automatic payments to transition to my Grundy Bank account?**

It depends on when your request is received by your service provider. Most requests are processed within a few weeks.

- **How will I know that my request has been received and processed?**

Monitor your accounts at your old bank and at Grundy Bank to ensure that all requested automatic payments have been successfully transferred. You should see a deposit or withdrawal appear on your Grundy Bank statement and no longer show up on your old bank's statement. Signing up for online banking at Grundy Bank will allow you to check your account more often.

- **What do I do if a service provider attempts to pull an automatic payment from my old bank account after I have closed it?**

Do not close your old account until you have confirmed that all automatic payments have successfully transferred to your new Grundy Bank account.

- **How can I find the information that I need to change a direct deposit/payment?**

You will need to contact your service provider to get or verify any information about your account. You can also find information about your accounts on your statements from your service providers.

- **How do I change my Social Security direct deposit?**

Go to [www.godirect.gov](http://www.godirect.gov) to set up direct deposit for your Social Security Benefits or call (800)772-1213 to change your bank account information.

- **How do I sign up for online banking with Grundy Bank?**

To sign up for online banking you can visit [www.grundy.bank](http://www.grundy.bank) or download the Grundy Bank app and click on enroll. When it asks for your pin # when enrolling, that is the last 4 of your social security number. If you need help enrolling or have questions call us at (815)942-0130.