



## SWITCH KIT

### MAKE THE SWITCH TO GRAYSTONE BANK: SWITCHING BANKS HAS NEVER BEEN EASIER!

Switch today and receive the uncompromising commitment to exceptional customer service that you deserve, along with individualized products and services to help you achieve your financial goals. And remember, at Graystone Bank we believe in giving you free access to your money - anytime, anywhere. Enjoy free unlimited ATM transactions – anywhere in the world, with no strings attached!

Follow the step by step guide below to make the switch to Graystone Bank! Please call us at 1 866 GRAYSTONE or visit your local Graystone Bank branch and we will be glad to help you every step of the way! Thank you for choosing Graystone Bank – we look forward to serving you! **Let's get started...**

#### [ 1 ] Open your Graystone Bank account at a branch or online.

Locate the closest Graystone Bank branch by clicking on the “Locations” tab on our website. Apply online by visiting [www.graystonebank.com](http://www.graystonebank.com). Click on “Open an Account Online!” and then choose the type of account you would like to open.

#### [ 2 ] Enroll in Online Banking.

Sign up for online banking by visiting a branch or [www.graystonebank.com](http://www.graystonebank.com) and click “First Time Log In” under Internet Banking. Manage your finances 24 hours a day with online banking from Graystone Bank.

#### [ 3 ] Set up Your Automatic Direct Deposits and Automatic Withdrawals from Graystone Bank.

- Fill out the attached Automatic Withdrawals and Direct Deposits chart to track any automatic payments and deposits that will be switched to Graystone Bank.
- Fill out the attached Automatic Deposit Authorization Form and let us help you switch your direct deposits into your new Graystone Bank account. Attach a voided Graystone Bank check to this form.
- Fill out the attached Automatic Withdrawal Authorization Form and let us help you switch your automatic withdrawals into your new Graystone Bank account.

#### [ 4 ] Transfer your funds to Graystone Bank.

Complete the attached Transfer Letter to authorize the closing of your account(s) at your current bank and transfer of funds to your Graystone Bank account. Remember to securely dispose of any old checks.

#### MISSION STATEMENT

Graystone Bank will positively impact lives by helping people achieve their dreams.

#### VISION STATEMENT

Graystone Bank will be a high performing regional financial services company that creates financial success for consumer, business, and not for profit customers in the markets we choose to serve.

#### VALUE STATEMENT

Graystone Bank is committed to attracting and retaining employees who are passionate about providing uncompromising service to our customers with a sense of warmth, integrity, friendliness, and company spirit. We value and respect each other because we truly believe that our success only comes from working together for our team's success.



# SWITCH KIT

Checking                       Savings                       Money Market                       Other \_\_\_\_\_

## APPLICANT

Last Name \_\_\_\_\_

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Birthdate \_\_\_\_\_ Social Security \_\_\_\_\_

Current Physical Address \_\_\_\_\_

City / State / Zip Code \_\_\_\_\_

Current Mailing Address \_\_\_\_\_

City / State / Zip Code \_\_\_\_\_

Driver's License Number and State \_\_\_\_\_

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

Work Phone \_\_\_\_\_ Email \_\_\_\_\_

Employer \_\_\_\_\_

Please choose three security questions and answers to verify your identity if you misplace your account information:

Security Question 1 \_\_\_\_\_ Answer \_\_\_\_\_

Security Question 2 \_\_\_\_\_ Answer \_\_\_\_\_

Security Question 3 \_\_\_\_\_ Answer \_\_\_\_\_

## JOINT APPLICANT

Last Name \_\_\_\_\_

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_

Birthdate \_\_\_\_\_ Social Security \_\_\_\_\_

Current Physical Address \_\_\_\_\_

City / State / Zip Code \_\_\_\_\_

Current Mailing Address \_\_\_\_\_

City / State / Zip Code \_\_\_\_\_

Driver's License Number and State \_\_\_\_\_

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

Work Phone \_\_\_\_\_ Email \_\_\_\_\_

Employer \_\_\_\_\_

Please choose three security questions and answers to verify your identity if you misplace your account information:

Security Question 1 \_\_\_\_\_ Answer \_\_\_\_\_

Security Question 2 \_\_\_\_\_ Answer \_\_\_\_\_

Security Question 3 \_\_\_\_\_ Answer \_\_\_\_\_

I certify that the information I have stated in the application and on any attachment is true and correct. By signing below, I understand that my signature(s) and opening deposit(s) will be required at a future date. I understand that bank approval standards apply. I agree to provide one or more forms of identification. I understand that this statement applies to all person who sign below.

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Signature of Co- Applicant \_\_\_\_\_ Date \_\_\_\_\_



# SWITCH KIT

## AUTOMATIC DEPOSIT AUTHORIZATION CHANGE

*This form serves as notification that I wish to change instructions for the automatic deposit to my new Graystone Bank account.*

### CUSTOMER INFORMATION

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_  
Daytime Phone \_\_\_\_\_  
Social Security \_\_\_\_\_

### ORIGINATOR INFORMATION

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_  
Type (i.e., payroll, pension, etc.) \_\_\_\_\_

### BANK ACCOUNT INFORMATION

Begin automatic deposit to the following account, effective: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ \*

Financial Institution: **Graystone Bank**      Routing Number: **031318907**

- Checking \_\_\_\_\_
- Savings \_\_\_\_\_
- Money Market \_\_\_\_\_
- Other \_\_\_\_\_

Discontinue automatic deposit to the following accounts:

Current Financial Institution: \_\_\_\_\_

- Checking \_\_\_\_\_
- Savings \_\_\_\_\_
- Money Market \_\_\_\_\_
- Other \_\_\_\_\_

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

\* Some automatic payments or debits require advance notice of changes. Please include these notice periods when determining the new effective dates.



# SWITCH KIT

## AUTOMATIC WITHDRAWAL AUTHORIZATION CHANGE

*This form serves as notification that I wish to change instructions for the automatic withdrawal to my new Graystone Bank account.*

### CUSTOMER INFORMATION

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_  
Daytime Phone \_\_\_\_\_  
Social Security \_\_\_\_\_

### PAYEE INFORMATION *(company receiving funds)*

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_  
Payment Type (i.e., mortgage, utilities, etc.) \_\_\_\_\_

### BANK ACCOUNT INFORMATION

Begin automatic withdrawal from the following account, effective: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ \*

Financial Institution: **Graystone Bank**      Routing Number: **031318907**

- Checking \_\_\_\_\_
- Savings \_\_\_\_\_
- Money Market \_\_\_\_\_
- Other \_\_\_\_\_

Discontinue automatic withdrawal from the following account:

Current Financial Institution: \_\_\_\_\_

- Checking \_\_\_\_\_
- Savings \_\_\_\_\_
- Money Market \_\_\_\_\_
- Other \_\_\_\_\_

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

\* Some automatic payments or debits require advance notice of changes. Please include these notice periods when determining the new effective dates.



## SWITCH KIT

### TRANSFER LETTER

*Please complete this form only if you request that Graystone Bank close your other financial institution's account(s) on your behalf.*

#### CUSTOMER INFORMATION

Name \_\_\_\_\_  
Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_

#### FINANCIAL INSTITUTION INFORMATION

Former Financial Institution's Name \_\_\_\_\_  
Former Financial Institution's Address \_\_\_\_\_  
City / State / Zip Code \_\_\_\_\_  
  
Date \_\_\_\_\_

#### ACCOUNT SERVICES

Please accept this as my authorization to close the following accounts:

Checking \_\_\_\_\_  
 Savings \_\_\_\_\_  
 Money Market \_\_\_\_\_  
 Other \_\_\_\_\_

Please make check payable to Customer's Name, reference the account number listed below, and send the check to:

Graystone Bank  
Attn: \_\_\_\_\_  
112 Market Street  
Harrisburg, PA 17101

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

#### ACCOUNT OWNER

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_

#### ACCOUNT CO-OWNER

Signature \_\_\_\_\_ Printed Name \_\_\_\_\_



Make the Switch to Graystone Bank!  
[www.graystonebank.com](http://www.graystonebank.com) · 1 866 GRAYSTONE

Member FDIC · Equal Housing Lender

## SWITCH KIT

### AUTOMATIC WITHDRAWALS

Payment	Company	Phone Number	Account Number	Amount	Date of Payment
Mortgage / Rent					
Auto Loans					
Insurance					
Credit Cards					
Gas / Oil					
Electric					
Cable / TV					
Telephone					
Cell Phone					
Water					
Trash Removal					
Internet					
Health Club					
Investments					
IRA / Retirement					
Charities					
Daycare					
School Expense					
Other					
Other					

### DIRECT DEPOSITS

Payment	Company	Phone Number	Account Number	Amount	Date of Payment
Employee Payroll					
Retirement					
Social Security					
Investments					
Other					
Other					