



Red Mountain Bank has totally reinvented the banking experience. We've created an environment that feels more like your den than a bank, and we provide you access to senior-level bankers who make decisions on their own. Switch to Red Mountain Bank and Discover the Difference!

Personal Switch Kit



RED MOUNTAIN BANK

Discover the Difference



RED MOUNTAIN BANK

Discover the Difference

Dear Prospective Client,

We are honored that you have decided to Discover the Difference of Red Mountain Bank. We know that your time is precious, and are happy to offer this “Switch Kit” to make switching your banking to Red Mountain Bank as simple as possible.

Due to the US Patriot Act of 2003, the following items are required and necessary to open an account with Red Mountain Bank. We thank you in advance for providing us with this information:

1. Personal information for each signer (Please use attached form)
2. Social Security Number
3. Copy of Driver’s License of each signer

We are also providing you with forms that help you complete your switch to Red Mountain Bank. These forms will help you to notify all companies or banks that you do business with of your new Red Mountain Bank information.

We thank you for your business and your confidence, and hope you will come by to see us very soon for a cup of Red Mountain Bank’s own “Daily Grind” coffee. If you have any questions or concerns, please call us at (205) 313-8100.

Warmest regards,

MIKE WASHBURN
President and CEO
Red Mountain Bank

Ready to Discover the Difference at Red Mountain Bank?

Welcome to Red Mountain Bank! If you've recently moved or want to change banks, it isn't always easy to know where to start. We want that to be the least of your worries! We have created a step-by-step checklist to simplify the transition.

It should be easy! Follow these simple steps:

- 1** Open a Red Mountain Bank checking account. You can read about our different checking account benefits on our website, www.redmountainbank.com. Complete the **New Account Information Form**, then stop by one of our banking centers to get started!
- 2** Stop using your previous checking account. Allow time for outstanding checks to clear—usually about 10 days. Destroy your unused checks, ATM and/or debit card.
- 3** Move your direct deposits to your new Red Mountain Bank account. Enclosed you will find a **Direct Deposit Change Form** to quickly assist you in making the switch. If you need to have your Social Security payment changed to deposit in Red Mountain Bank, please call the Social Security Administration at 1-800-772-1213 or go to www.ssa.gov/deposit/howtosign/htm.
- 4** Transfer any automatic payments and debits to Red Mountain Bank. Notify anyone deducting automatic payments (insurance, gym dues, car payment, etc.) from your previous account to your new Red Mountain Bank account. Enclosed you will find the **Automatic Payment Change Form** to assist you in this smooth transition.
- 5** Close your previous checking account. After all your checks and automatic payments have cleared, close your previous checking account. Enclosed is a **Account Closing Form** to notify your previous bank of your decision to close your account.

**If you have ANY questions or concerns as you go through this simple process,
please contact your Red Mountain Banker at (205) 313-8100.**





New Account Information Form

Primary Account Holder

Secondary Account Holder

Other

	Primary Account Holder	Secondary Account Holder	Other
Full Legal Name			
Name to appear on your account and checks			
Social Security Number			
Street Address including City, State & ZIP			
Date of Birth			
Home phone number			
Work phone number			
Mobile phone number			
Email address			
Valid Current Driver's License number			
Issue Date of License			
Expiration Date of License			
State of issuance			



Direct Deposit Change Form

Date: _____

Employer's Company Name: _____

Company Address: _____

City, State, ZIP: _____

To Whom It May Concern:

I have recently changed my banking relationship to Red Mountain Bank. Please redirect my direct deposit to my new account at Red Mountain Bank. I hereby authorize _____ (Company/organization name) to initiate credit entries and to initiate, if necessary, debit entries and adjustments for any credit error to my account indicated below and authorize Red Mountain Bank to credit and/or debit the same to such account. This authority is to remain in full force and effect until company listed above, and Red Mountain Bank have received notification from me of its termination and have had a reasonable opportunity to act on it.

My new account information is listed below:

Printed name: _____

Signature: _____ Date: _____

Soc. Sec. Number or Tax ID Number: _____

Daytime phone number: _____

Red Mountain Bank Account Number: _____

Red Mountain Bank routing number: _____

Please attach a voided check from your new Red Mountain Bank account here:



Automatic Payment Change Form

Date: _____

Name of Account: _____

Address: _____

City, State, ZIP: _____

To Whom It May Concern:

I've recently changed my banking relationship to Red Mountain Bank. You are currently withdrawing \$_____ from the following account:

Old Bank: _____

Routing Number: _____

Account Number: _____

For (reason for payment): _____

On (date of month): _____

Please accept my authorization to stop making withdrawals from this account effective _____ and start making them at that time from my Red Mountain Bank.

Red Mountain Bank routing number: 062206486

Red Mountain Bank account number: _____

Please contact me immediately with any questions at phone #: _____

Sincerely,

Name of Account: _____

Signature – primary signer: _____

Name (please print): _____

Signature – secondary signer (if applicable): _____

Name (Please print): _____

Company name and address (if applicable): _____



Close Account Form

Date: _____

Name of Account: _____

Address: _____

City, State, ZIP: _____

Re: Account number: _____

To Whom It May Concern:

Effective _____, please close checking account # _____ and send a check for the remaining balance to the address below. If you have any questions, I can be reached at phone # _____.

Sincerely,

Name of Account: _____

Signature – primary signer: _____

Name/Title (please print): _____

Signature – secondary signer: _____

Name/Title (please print): _____

Company Name (if applicable): _____

Address: City, State, ZIP: _____