

# SimpleSwitchKit

Switching to *Security State Bank* has never been simpler!

Interested in switching your accounts to **SECURITY STATE BANK**? Not sure how to get started? We've developed the SSB Simple Switch Kit, a step-by-step guide to help make your transition to a new **Security State Bank** account as simple as possible. Just follow the steps to get started.

If we can be of any assistance throughout this transition, please call on our friendly Account Service Representatives in New Accounts at **405.379.2265** or Bookkeeping at **405.257.7717**. Thank you for choosing to **Come Home to Security State Bank, where you're one of the family!**



Security State Bank  
Routing Number (ABA): 103109374  
www.ssbok.com

*Banking Generations Since 1911*

- Step 1: Open a *Security State Bank* Checking account!** Come see an Account Service Representative at one of our convenient locations and determine what account(s) best fit you.  
  
We know your time is valuable, complete the Customer Information Form before coming in to make the process as fast as possible.
- Step 2: Sign up for *SSB* Online Banking and Mobile Banking!** Track your direct deposits, checks, debit card transactions, and automatic payments with ease. Also take advantage of our FREE Online Bill Pay service.
- Step 3: Stop using your former checking account.** Be sure to allow time for all outstanding debit card transactions and checks to clear. For your security, destroy any unused checks, deposit slips, and Debit/ATM card. If you like, we can do that for you.
- Step 4: Move your Direct Deposit(s) to your new *SSB* Checking account.** Make this step simple by using the Direct Deposit Request Form.
- Step 5: Transfer any Automatic Payments and Debits to your new *SSB* Checking account.** The Automatic Payment Request Form makes easy work out of this step. Remember recurring payments you make by ACH, Debit Card, and Automatic Transfer.
- Step 6: Transfer any existing Online Bill Pay at your former bank to your new free *SSB* Online Bill Pay\*.** Use the Online Bill Payer Form to help make the switch simple and pain free.
- Step 7: Close your former checking account.** When you are sure that all outstanding items have cleared **and** your Direct Deposits and Automatic Payments have made the switch to your new **SSB** Checking account, it's time to close your former checking account. Take or mail the completed Account Closing Request Form to your former bank or call them to make arrangements to close the account and forward any remaining funds to you.

# SimpleSwitchKit

Switching to **Security State Bank** has never been simpler!

## CUSTOMER INFORMATION FORM

### Primary Account Holder Information

Full Legal Name:

Physical Address:

City:

State:

Zip:

Mailing Address: if different from above

City:

State:

Zip:

Home Phone:

Work Phone:

Mobile Phone:

Drivers License/ID #:

Issue Date:

Exp. Date:

Employer:

Position/Title:

E-mail Address:

### Secondary Account Holder Information

Full Legal Name:

Physical Address:

City:

State:

Zip:

Mailing Address: if different from above

City:

State:

Zip:

Home Phone:

Work Phone:

Mobile Phone:

Drivers License/ID #:

Issue Date:

Exp. Date:

Employer:

Position/Title:

E-mail Address:

### Accounts and Services

Please check the Accounts and Services you are currently using and/or may wish to use.

\*Pending approval

approval

Personal Checking Account

Business Checking Account

FREE Online Bill Pay

Interest Bearing Personal Checking

Interest Bearing Business Checking

Safe Deposit Box

Personal Savings Account

Business Savings Account

Consumer Loan/Line\*

Christmas Club Account

Business Certificate of Deposit

Business Loan/Line\*

Individual Retirement Account

Debit/ATM Card

Mortgage Loan\*

Health Savings Account

Online Banking

Construction Loan\*

Personal Certificate of Deposit

Mobile Banking

Other: \_\_\_\_\_

# Simple**Switch**Kit Switching to *Security State Bank* has never been simpler!

## Direct Deposit Request Instructions

### Direct Deposits

Use your previous bank statements and our handy checklist to identify the Direct Deposits you need to switch to your new **SECURITY STATE BANK** Checking account.

#### Direct Deposit Checklist

Payment	Company	Account Number	Amount	Date of Payment
Employee Payroll				
Pension/Retirement				
Social Security				
Supplement Security				
VA Compensation				
Interest Income				
Investment Income				
Dividends				
Other:				

Use the [Direct Deposit Request Form](#) to notify depositors of your new **SECURITY STATE BANK** Checking account information. **Before** you send out the form be sure to check with your employer or source of income to make sure no other forms are required.

#### Helpful Phone Numbers and Web Sites

Social Security Administration	800.772.1213	<a href="http://www.ssa.gov/deposit/howtosign.htm">www.ssa.gov/deposit/howtosign.htm</a>
Office of Personnel Management	888.767.6738	<a href="http://www.opm.gov">www.opm.gov</a>
Railroad Retirement Board	800.808.0772	<a href="http://www.rrb.gov">www.rrb.gov</a>
Department of Veteran Affairs	877.838.2778 or 800.827.1000	<a href="http://www.va.gov">www.va.gov</a>

**After** you have sent the [Direct Deposit Request Form](#):

1. Confirm with your employer or source of income that forms were received and processed.
2. Maintain your former checking account until the switch is complete.
3. Monitor you new **SECURITY STATE BANK** Checking account through **SECURITY STATE BANK** Internet or Mobile Banking, or call Bookkeeping at 405-257-7717 to verify receipt of your Direct Deposit(s).

# Simple**SwitchKit** Switching to *Security State Bank* has never been simpler!

## Direct Deposit Request Form

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

Address: \_\_\_\_\_

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

### RE: Switching My Direct Deposit to a New Account

I have recently changed financial institutions and would like to update my Direct Deposit information. Please discontinue my current direct deposit and begin making direct deposits into my new ***SECURITY STATE BANK*** Checking account.

If you have any questions regarding this matter, please contact me by mail or call me at the phone number provided below.

I am aware that some automatic deposits may require advance notice of changes and that depending on the timing of this request my next deposit may not be sent to my new bank account.

Thank you for your prompt assistance in this matter.

Sincerely,

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

\_\_\_\_\_  
Date

### Direct Deposit Information

Name:		SSN or Employee No.	
Address:	City:	State & Zip:	
Home Phone:		Mobile Phone:	
Former Bank Name:		Routing Number:	
Former Account Number:		Amount of Deposit:	
NEW Bank Name: <b><i>Security State Bank</i></b>		NEW Routing Number: <b>103109374</b>	
NEW Account Number:		Amount of Deposit:	

## Automatic Payment Request Instructions

### Automatic Payments

Use your previous bank statements and our handy checklist to identify the Automatic Payments and Debits you need to switch to your new **SECURITY STATE BANK** Checking account.

#### Automatic Payment Checklist

Payment	Company	Account Number	Amount	Date of Payment
Mortgage/Rent				
Auto Loans				
Insurance				
Electric				
Telephone				
Cable/TV				
Cell Phone				
Gas/Oil				
Water				
Internet Provider				
Credit Cards				
Daycare				
Tuition/School				
Trash Removal				
Other:				

Use the [Automatic Payment Request Form](#) to notify debiting companies of your new **SECURITY STATE BANK** Checking account information. **Before** you send out the form be sure to check with these companies to make sure no other forms are required. You may be able to make changes to account information online.

**After** you have sent the [Automatic Payment Request Forms](#):

1. Confirm with companies that forms were received and processed.
2. Maintain your former checking account until the switch is complete.
3. Monitor your new **SECURITY STATE BANK** Checking account through **SECURITY STATE BANK** Internet or Mobile Banking, or call Bookkeeping at 405-257-7717 to verify debits have been posted.

# Simple**SwitchKit** Switching to *Security State Bank* has never been simpler!

## Automatic Payment Request Form

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

\_\_\_\_\_  
Address:

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

### RE: Switching My Automatic Payments to a New Account

#### Attn: Accounts Receivable/Accounting

I have recently changed financial institutions and would like to update my automatic payment information. Please discontinue my current debit arrangement and begin making automatic withdrawals from my new **SECURITY STATE BANK** Checking account.

If you have any questions regarding this matter, please contact me by mail or call me at the phone number provided below.

I am aware that some automatic withdrawals may require advance notice of changes and that depending on the timing of this request my next automatic payment may not be withdrawn from my new bank account.

Thank you for your prompt assistance in this matter.

Sincerely,

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

\_\_\_\_\_  
Date

### Automatic Payment Information

Name:			Payee Name:		
Address:		City:		State & Zip:	
Home Phone:			Mobile Phone:		
Former Bank Name:			Routing Number:		
Former Account Number:			Amount of Debit:		
NEW Bank Name: <b>Security State Bank</b>			NEW Routing Number: <b>103109374</b>		
NEW Account Number:			Amount of Deposit:		



## Account Closing Request Instructions

### Before sending the Account Closing Request Form:

1. Check with your former bank to make sure that no additional information or forms are required.
2. If multiple accounts are involved, please complete a form for each account.
3. Inquire about any possible penalties with respect to early withdrawal before you close the account. If the account you are closing is a Certificate of Deposit (CD) it is important to check the maturity date. You may want to delay the switch of a CD to avoid penalties.
4. Verify that all checks and automatic payments have cleared prior to submitting the Account Closing Request Form.
5. Be sure that all automatic transactions have made the switch to your new **SSB Checking Account** prior to submitting the Account Closing Request Form.

### After you've sent the Account Closing Request Form:

1. Check account statements from your former bank to verify that accounts have a zero balance and have been closed.
2. Enjoy your new **SSB Checking Account** and all the great services that **Security State Bank has** to offer.

### SECURITY STATE BANK LOCATIONS

FAIRFAX, OK	HOLDENVILLE, OK	MAUD, OK	SEMINOLE, OK	WEWOKA, OK
308 N. Main Street PO Box 427	1701 E. Highway Street PO Box 873	206 W. Wanda Jackson Rd. PO Box 40	824 N. Milt Phillips PO Box 1627	210 S. Mekusukey PO Box 749
Fairfax, OK 74637 (918) 642-3221	Holdenville, OK 74848 (405) 379-2265	Maud, OK 74854 (405) 374-2265	Seminole, OK 74868 (405) 303-2265	Wewoka, OK 74884 (405) 257-5411



# Simple**Switch**Kit

Switching to **Security State Bank** has never been simpler!

## Account Closing Request Form

\_\_\_\_\_

Date:

\_\_\_\_\_

Bank Name:

\_\_\_\_\_

Address:

\_\_\_\_\_

City, State, Zip

Primary Account Holder:

\_\_\_\_\_

Name:

\_\_\_\_\_

Address:

\_\_\_\_\_

City, State, Zip

Secondary Account Holder:

\_\_\_\_\_

Name:

\_\_\_\_\_

Address:

\_\_\_\_\_

City, State, Zip

**RE: Account Number** \_\_\_\_\_

Checking       Savings       Other

**Attention: Account Services**

Please accept this letter as my official authorization to close my account with your institution.

Please send a check in the amount of my account balance, if any, to my attention at the address you have on file. If you have any questions regarding this matter please call me at my daytime phone number: \_\_\_\_\_.

Thank you for your prompt assistance.

Sincerely,

\_\_\_\_\_

Customer Signature