

# New Account Kit

## New Account Opening Made Easy!

With a few pieces of information and signatures from you, we'll make opening accounts and switching banks nice and easy!

- 1 New Account Information** – We'll start by gathering all the information we'll need to establish your account.
- 2 Account Closing Letter** – We can help you fill in the blanks on this form and then you'll just sign it; it notifies your old bank about the accounts you are closing and gives directions for disbursement of any remaining funds in those accounts.
- 3 Direct Deposit Request** – Direct Deposit simplifies everything! This form can be sent to your employer or other payment source, so your funds can be automatically deposited to your accounts each pay period. Nice and convenient.
- 4 Automatic Payment Change Letter** – Sign this prepared form and we can send it to each of your vendors to switch any automatic payments so they'll come out of your new account.

### But what do I do with my...

**Unused checks and debit card** – bring them in; we'll recycle them for you!

**Former online bill payment account** – bring us a list of your payees, and we'll help you set them up!

# New Account Kit Step 1 – New Account Information

I'd like to open...

- |  |  |
|--|--|
| <input type="checkbox"/> Pinnacle Banking Accounts | <input type="checkbox"/> Statement Savings Account           |
| <input type="checkbox"/> Personal Checking Account | <input type="checkbox"/> Certificate of Deposit (CD)         |
| <input type="checkbox"/> Business Checking Account | <input type="checkbox"/> Individual Retirement Account (IRA) |

## Individual Account

Name \_\_\_\_\_  
Street Address \_\_\_\_\_  
City, State, Zip \_\_\_\_\_  
Mailing Address (if different) \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_  
Email Address \_\_\_\_\_

## Joint Account

Name \_\_\_\_\_  
Street Address (if different) \_\_\_\_\_  
City, State, Zip (if different) \_\_\_\_\_  
Mailing Address (if different) \_\_\_\_\_  
Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_  
Email Address \_\_\_\_\_

## Primary Account Holder Information

Social Security Number \_\_\_\_\_  
Driver's License Number \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Mother's Maiden Name \_\_\_\_\_  
Employer \_\_\_\_\_  
Position \_\_\_\_\_

## Joint Account Holder Information

Social Security Number \_\_\_\_\_  
Driver's License Number \_\_\_\_\_ Expiration Date \_\_\_\_\_  
Date of Birth \_\_\_\_\_  
Mother's Maiden Name \_\_\_\_\_  
Employer \_\_\_\_\_  
Position \_\_\_\_\_

Please note that Primary and Joint account holders will need to sign an official account form in person before an account can be opened.

For your own account security, we'll also need to photocopy your driver's license(s), or other form of ID, so we can have it on file to accurately identify you in the future.

**The purpose of this questionnaire is to begin the application process. All applications are subject to approval.**

# New Account Kit Step 2 – Account Closing Letter

To: \_\_\_\_\_  
(Previous Financial Institution Name)

From: Primary Account Holder: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Secondary Account Holder: \_\_\_\_\_

Please close the following account(s) with your institution:

Account Type	Account #	Send Payment At Once	Defer Payment Until Close of Interest Period

(NOTE: If closing out a passbook account, please include passbook with this letter.)

Pay to the order of:

**Hoosac Bank F/B/O**

Together with all interest or dividends that may have become due on the above listed accounts.

Bank Routing #: 211871015

Customer Account #: \_\_\_\_\_

**Williamstown Savings Bank F/B/O**

Together with all interest or dividends that may have become due on the above listed accounts.

Bank Routing #: 211872946

Customer Account #: \_\_\_\_\_

I have notified all parties authorized to draw against the above listed accounts to cease doing so and will be responsible for overdraft fees caused by authorized drawers.

Primary Account Holder Signature: \_\_\_\_\_

Secondary Account Holder Signature: \_\_\_\_\_

Date: \_\_\_\_\_

## New Account Kit Step 3 – Direct Deposit Request

NOTE: For **Social Security Direct Deposit**, we can assist you with calling the Social Security Administration Direct Deposit Department at 1-800-772-1213 or signing up online at [www.ssa.gov/deposit/](http://www.ssa.gov/deposit/).

To:

Employer: \_\_\_\_\_

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

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

From:

Employee: \_\_\_\_\_

Social Security #: \_\_\_\_\_

Please send an automatic direct deposit to (please select one):

**Hoosac Bank**  
Routing #: 211871015

**Williamstown Savings Bank**  
Routing #: 211872946

Deposit \$ \_\_\_\_\_ OR entire amount to Account #: \_\_\_\_\_

This is a  Checking Account  Savings Account

I authorize the above named Employer to deposit the above payment to the account noted above. This request is to remain in effect until changed by me in writing. I agree that any funds erroneously deposited into my account in excess of my authorized amount may then be withdrawn without any liability or prior notice.

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

# New Account Kit Step 4 – Automatic Payment Change

To: \_\_\_\_\_  
(Company)

From: \_\_\_\_\_  
(Customer)

Account/Policy #: \_\_\_\_\_

My current payment amount is: \$ \_\_\_\_\_

I am currently paying the Total Amount Due

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Please be advised that I have recently changed banks and will need to have my automatic withdrawal payment switched from my old bank account to my new bank account.

As soon as possible, I would like this automatic debit redirected to my new account as follows:

**Hoosac Bank**

Routing #: 211871015

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

**Williamstown Savings Bank**

Routing #: 211872946

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

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If you have any questions, please call me at: \_\_\_\_\_

Signed \_\_\_\_\_

Date \_\_\_\_\_