WEST GATE BANK®

*Our interest is **you***

MEMBER FDIC



# Switch Kit

We make it easy to switch to West Gate Bank®.

Follow this simple checklist to make your move as smooth as possible.

- ☐ Keep your banker's name and number on hand for any questions or assistance:

  Name: _____ Number: _____

- ☐ Open your new account(s) at West Gate Bank!
- ☐ Ask your banker how to locate your routing and account numbers in online banking, or record them on the attached Track Your Switch form for future reference
- ☐ Confirm all checks have cleared and all automatic payments have been switched to pull from your new West Gate Bank account before you close your old account.
- ☐ Make sure you have received new account checks and a debit card. Contact your banker if these items were not ordered/received.
- ☐ Notify your previous bank and close the old account. Refer to the Transfer Funds Form for options on how to move your funds to West Gate Bank.
- ☐ Destroy any unused checks, deposit slips, and debit cards from your old account, or bring them to a West Gate Bank branch for secure shredding.

# Payroll Setup

WEST GATE BANK®
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Please provide this form to your employer to set up direct deposit of your payroll benefits to your new West Gate Bank account.

NAME _____

ADDRESS _____

CITY, STATE, ZIP _____

TYPE OF ACCOUNT (CHECKING OR SAVINGS) _____

ACCOUNT NUMBER _____

BANK ROUTING NUMBER _____

SIGNATURE _____

**If your employer has any questions, please ask them to contact us.**

WEST GATE BANK CONTACT _____

WEST GATE BANK CONTACT NUMBER _____

DLC 10.27.17 LAD

# Direct Deposit

WEST GATE BANK®
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Name of Payee (Beneficiary): _____

Social Security Number: _____

Address: _____
_____
_____

Telephone Number: _____

Representative Payee: _____ Yes _____ No

Routing Number: 104901584

Account Type: ☐ CHECKING ☐ SAVINGS

Account Number: _____

**Payee Signature:** _____

**TYPE OF BENEFITS: (check one)**

- ☐ Social Security
- ☐ Payroll
- ☐ Veterans Administration Education
- ☐ Railroad Retirement Annuity
- ☐ Federal Civil Service Survivor/Annuity
- ☐ Supplemental Security Income
- ☐ Veterans Administration Compensation & Pension
- ☐ Veterans Administration Life Insurance
- ☐ Railroad Unemployment/Sickness
- ☐ Federal Civil Service Retirement Annuity

Completed By: _____

Date: _____

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# Track Your Switch

WEST GATE BANK®
*Our interest is **you***

## OUTSTANDING CHECKS

| | | |
|---|---|---|
| ONE | OUTSTANDING CHECK PAYABLE TO: | |
| | OUTSTANDING CHECK #: | |
| | OUTSTANDING CHECK AMOUNT: | |
| | DATE CLEARED: | / / |

| | | |
|---|---|---|
| TWO | OUTSTANDING CHECK PAYABLE TO: | |
| | OUTSTANDING CHECK #: | |
| | OUTSTANDING CHECK AMOUNT: | |
| | DATE CLEARED: | / / |

| | | |
|---|---|---|
| THREE | OUTSTANDING CHECK PAYABLE TO: | |
| | OUTSTANDING CHECK #: | |
| | OUTSTANDING CHECK AMOUNT: | |
| | DATE CLEARED: | / / |

| | | |
|---|---|---|
| FOUR | OUTSTANDING CHECK PAYABLE TO: | |
| | OUTSTANDING CHECK #: | |
| | OUTSTANDING CHECK AMOUNT: | |
| | DATE CLEARED: | / / |

Make sure all your outstanding checks have cleared.

# Track Your Switch

WEST GATE BANK®
*Our interest is **you***

You can use this form to keep track of all the information you need to move your direct deposits, payments and close your old account.

YOUR WEST GATE BANK ACCOUNT #_____

YOUR WEST GATE BANK ROUTING #_____104901584_____

## DIRECT DEPOSIT

| | | | |
|---|---|---|---|
| ONE | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

| | | | |
|---|---|---|---|
| TWO | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

| | | | |
|---|---|---|---|
| THREE | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

## AUTOMATIC PAYMENTS

| | | | |
|---|---|---|---|
| ONE | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

| | | | |
|---|---|---|---|
| TWO | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

| | | | |
|---|---|---|---|
| THREE | COMPANY: (Name/Address) | | |
| | DATE OF NOTIFICATION: | / / | STATUS |
| | ESTIMATED SWITCHING DATE: | / / | |

# Authorization for Automatic Payments

SERVICE PROVIDER: _____

MY ACCOUNT # WITH
YOUR ORGANIZATION: _____

PLEASE SWITCH MY AUTOMATIC PAYMENT TO WEST GATE BANK STARTING:
DATE: _____ / _____ / _____

TYPE OF ACCOUNT:_____
(Checking or Savings)

NEW ACCOUNT #: _____

NEW BANK ROUTING #: 104901584 _____

ACCOUNT HOLDER:_____

ADDRESS: _____

CITY, STATE, ZIP: _____

DAYTIME PHONE: ( _____ ) _____ - _____

SIGNATURE: _____

PRINTED NAME: _____

# Transfer Funds Form

WEST GATE BANK®
*Our interest is **you***

Ready to move your funds to your new West Gate Bank account? We offer convenient options for transferring funds from your previous financial institution.

**You can request:**

- A Cashier's Check issued from your current financial institution
- A Check mailed directly to you for deposit into your new account
- A Wire Transfer sent directly to your West Gate Bank account

## Domestic Wiring Instructions

Bank Name: West Gate Bank
6003 Old Cheney Road, Ste 100
Lincoln, NE 68516
ABA# 104901584

Final credit to:

Customer _____

Account # _____

Additional Info _____

_____

*Orignator Financial Institution country is required (Even if it is the USA)

*Wire cutoff time is 3:00 PM, funds received after 4:30 PM may be posted on the next business day.

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