

# SWITCHING TO YOUR BANKWEST CHECKING ACCOUNT

Switching banks can seem like a chore. We have people and tools to help you with this transition. Follow these four easy steps for a smooth account transition.

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## 1. Select your checking preference and open your BankWest account.

Stop by any of our convenient locations and speak with one of our helpful staff about the right account for you, or open an account online at <https://www.bankwest-sd.bank/personal/checking/>.

## 2. Stop making transactions from your old account.

Leave enough money in your old account to cover outstanding checks and automatic payments. Cancel future online or automatic bill payments if applicable.

## 3. Transfer any automatic payments, deposits and saved information for online shopping to your new account.

- a) We've provided a checklist to help you identify the automatic payments and deposits being made from or to your old account. It's helpful to review a few of your previous months' statements from your old bank to see where your recurring transactions are coming from.
- b) Use the attached authorization forms to notify companies of the need to convert your automatic payments and direct deposits to your BankWest account. You may make additional copies of these forms if you have multiple accounts to update.
- c) Use your previous months' statements to review any retailers that you frequently purchase from online. Be sure to update debit card information so your next purchase will be a breeze!

## 4. Close your old account.

After all outstanding items have cleared your account and your direct deposits, automatic payments and online payments have been converted, close your old account. As a final step, destroy any unused checks, deposit slips and debit cards for the account.

## WHY IS BANKWEST THE BEST CHOICE?

- With roots firmly planted in South Dakota, BankWest has helped customers succeed and communities prosper for over 130 years.
- Our friendly staff are knowledgeable and ready to assist you with personalized service to help you with your financial needs.
- Whether you prefer to bank face to face, through your smartphone, or both, BankWest makes it convenient to get service how, when and where you want.

Thank you for choosing BankWest!



## DEPOSIT/PAYMENT CONVERSION CHECKLISTS

If you have funds automatically credited to or debited from your old account, you can use this checklist to help track converting these transactions to your new account.

DEPOSITS	DATE OF NOTIFICATION
Paycheck	
Dividends	
Pension Funds	
Social Security	
Other	
Other	
Other	
Other	
Other	

AUTOMATIC PAYMENTS	DATE OF NOTIFICATION
Mortgage/Rent	
Electricity	
Gas	
Water	
Telephone	
Cell Phone	
Cable/Satellite TV	
Internet Service	
Car 1	
Car 2	
Credit Card 1	
Credit Card 2	
Insurance - Car	
Insurance - Home	
Insurance - Life	
Investments	
Savings	
Loan	
Other	
Other	
Other	
Other	
Other	

ONLINE PAYMENTS	DATE OF NOTIFICATION
Mortgage/Rent	
Electricity	
Gas	
Water	
Telephone	
Cell Phone	
Cable/Satellite TV	
Internet Service	
Car 1	
Car 2	
Credit Card 1	
Credit Card 2	
Insurance - Car	
Insurance - Home	
Insurance - Life	
Investments	
Savings	
Loan	
Other	
Other	
Other	
Other	
Other	

## Authorization to CLOSE CHECKING ACCOUNT

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

On \_\_\_\_\_ please close my checking account at \_\_\_\_\_ Acct # \_\_\_\_\_  
Month/Day/Year Name of Financial Institution

**Account Holder** \_\_\_\_\_ **Social Security #** \_\_\_\_\_

**2nd Account Holder** \_\_\_\_\_ **Social Security #** \_\_\_\_\_

I (we) have opened a checking account at BankWest. New account #: \_\_\_\_\_

**Financial Institution Address:** PO Box 998 Pierre, SD 57501

On the closing date, please send remaining funds to: \_\_\_\_\_ My New Financial institution \_\_\_\_\_ Directly to Me

**Address Where Check is to be Sent:** \_\_\_\_\_  
Street Address or PO Box City State Zip

Signature(s) \_\_\_\_\_

Daytime Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

## Authorization to CHANGE DIRECT DEPOSIT

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

On \_\_\_\_\_ I closed my checking account # \_\_\_\_\_  
(Date)

at \_\_\_\_\_  
(Name of Financial Institution)

Account Holder: \_\_\_\_\_ Social Security # \_\_\_\_\_

**Please Direct Deposit into my new checking account at BankWest beginning** \_\_\_\_\_  
(Date)

**New account #:** \_\_\_\_\_

I have enclosed a deposit slip and a voided check to verify the account number.

Signature(s) \_\_\_\_\_ Daytime Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

*Complete this form for every depositor with whom you have arrangements for Direct Deposit.*

## Authorization to CHANGE AUTOMATIC PAYMENT

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

**Attention:** \_\_\_\_\_ **My account # with you is** \_\_\_\_\_  
(Company Name)

On \_\_\_\_\_ I closed my checking account # \_\_\_\_\_  
(Date)

at \_\_\_\_\_  
(Name of Financial Institution)

Account Holder: \_\_\_\_\_ Social Security # \_\_\_\_\_

**I hereby authorize Automatic Payment from my new checking account at BankWest beginning** \_\_\_\_\_  
(Date)

**New checking account #:** \_\_\_\_\_

I have enclosed a voided check to verify the checking account number.

Signature(s) \_\_\_\_\_ Daytime Phone: ( \_\_\_\_\_ ) \_\_\_\_\_

*Complete this form for every company with whom you have arrangements for Automatic Payment.*