



**WOODLANDS BANK**  
Member **FDIC**

# Easy Switch Checklist

Ready to make the switch? Opening an account at Woodlands Bank is easy.

You can now open most of our accounts online at [woodlandsbank.com](http://woodlandsbank.com), from the comfort of your home.



However, if you'd like to open your account in-person at one of our branches, here is a quick checklist of information needed to open an account.

## Items You'll Need:

- Basic Contact Info**
- Street Address**  
(P.O. box holders must also furnish a physical address.)
- Valid Photo ID**  
(IDs must have your current, up-to-date address on it, if it does not, you'll be asked to provide proof of current address such as a lease agreement, utility bill, etc.)
- Social Security Number**

## Checklist to Successfully Switch:

- 1) Open online or find a convenient branch to visit.**  
A full list of our locations and hours can be found at [woodlandsbank.com/locations](http://woodlandsbank.com/locations).
- 2) Let our helpful staff open your account.**  
Have your required items listed above ready. You'll be asked to provide your basic information including: name, date of birth, street address, phone number, email, social security number, valid photo ID and name of employer.
- 3) Setup your direct deposit.**  
If you wish to have your paycheck or social security check deposited into your new account, be sure to provide your new account and routing number to your employer and/or the Social Security Administration.
- 4) Switch over any automatic payments to your new account.**  
If you have automatic payments being deducted from your old checking or savings account, you'll need to contact those companies (providers such as electricity, phone or internet, credit cards, etc.) directly and provide them with your new account and routing number.
- 5) Close your old account.**  
You'll want to wait until all outstanding items have cleared the account and all automatic payments are coming out of your new account. Then you can notify your old bank in writing or in person that you wish to close your account. They will issue a check for any remaining balance so you can deposit it into your new Woodlands Bank account.
- 6) Get the most out of your account.**  
From mobile and online banking, to all the rewards that come with your account, there's a lot to love about Woodlands Bank. Be sure to ask your customer service specialist how to get the most out of your new account.

