

Account Checklist

This is a guide to make your move to Hometown Bank easy and convenient. We are here to help you. Simply provide our staff with the information listed below, and we will do the rest.

- To close an account and transfer any remaining funds, you will need:**
 - Old account number or recent bank statement
 - Account Closing/Transfer Request form (provided by Hometown Bank)
 - New account number/routing number (provided by Hometown Bank)
 - Remember to make sure all checks have cleared on your old account

- To change your payroll or direct deposit, you will need:**
 - Old account number or recent bank statement
 - New account number/routing number (provided by Hometown Bank)
 - Payroll/Direct Deposit Transfer Request form (provided by Hometown Bank)

- To change your Social Security Direct Deposit, you will need:**
 - New checking or savings account number/routing number (provided by Hometown Bank)
 - Government's Standard form 1199A (provided by Hometown Bank)

- To change an automatic payment or withdrawal, you will need:**
 - Recent statement from vendor
 - New account number/routing number (checking, savings, etc. provided by Hometown Bank)
 - Automatic Payment/Withdrawal Request form (provided by Hometown Bank)

- To discuss transferring an existing loan, you will need:**
 - Recent loan statement with loan account number and remaining balance
 - Loan Transfer Worksheet (provided by Hometown Bank)

- To transfer a 401k (or other retirement account) you will need:**
 - Recent account statement
 - Contact information from your employer or former employer
 - New account number/routing number (provided by Hometown Bank)



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