



Easy2Switch

Stock Yards Bank & Trust SINCE 1904

Switching banks isn't difficult - if you have the right tools. We can help! The following forms will guide you through the process, so you don't have to guess the next step. Moving an account to Stock Yards Bank is easy!

A "STEP BY STEP" KIT TO SWITCH TO STOCK YARDS BANK.

Getting Started...	
>	OPEN A STOCK YARDS BANK ACCOUNT
>	GET ORGANIZED
>	BALANCE YOUR ACCOUNT

Making The Switch...	
>	DIRECT DEPOSIT OF PAYROLL
>	AUTOMATIC DEPOSITS
>	AUTOMATIC DEDUCTIONS

After You Switch	
>	CLOSE YOUR OLD ACCOUNT
>	KEEP TRACK OF CHANGES

A TRUSTED PARTNER, since 1904.



Get Organized

Use this form to itemize the transactions that you'll be switching to Stock Yards Bank.

If you have not already opened an account go to the nearest Stock Yards Bank & Trust office.

1. Write your new Stock Yards Bank account number and ABA routing number here for easy reference.

Your new Account Number:

Your new ABA Routing Number:

OFFICE ADDRESS:

CITY, STATE, ZIP CODE:

2. Have your most recent bank statement from your old bank on hand.
List all the companies which make Direct Deposits of Payroll into your account:

COMPANY NAME	ACCOUNT NUMBER	DEPOSIT AMOUNT

List all the companies that make Automatic Deposits into your account:

COMPANY NAME	ACCOUNT NUMBER	DEPOSIT AMOUNT

List all the companies that make Automatic Deductions from your account:

COMPANY NAME	ACCOUNT NUMBER	PAYMENT AMOUNT

3. Gather details of any activity that has occurred since your last statement, either online at your bank or in your check register if you keep one. Consider any ATM withdrawals, checks or debit card purchases you may have made.
4. Write your old account number and ABA routing number here for easy reference.

FINANCIAL INSTITUTION:

ACCOUNT NUMBER:

ABA ROUTING NUMBER:

HELPFUL INFORMATION

▶ ABA ROUTING NUMBER

It's a 9-digit number assigned to the bank and used for routing transfers and other transactions. You can find it on your new Stock Yards Bank checks: it's the first nine digits in the lower left hand corner.

▶ OFFICE ADDRESS

You can locate the address of your Stock Yards Bank Office at www.syb.com/locations

▶ AUTOMATIC DEPOSITS

These are recurring payments automatically deposited into your account on a regular basis. Examples are alimony, dividend or disability payments.

▶ AUTOMATIC DEDUCTIONS

These are recurring payments automatically withdrawn from your account on a regular basis. Examples are gym membership fees and insurance premiums.

▶ DIRECT DIAL...

Contact each company to find out the address of the main accounting office, where you should send that form. Make sure no other forms are required.

Balance Your Account

Use this form to determine the balance in your old account and how much you'll need to leave in it to cover any outstanding expenses.

HELPFUL INFORMATION

➤ ARE YOU UP TO DATE?

Use debit card purchase receipts, ATM receipts, and your check register to identify items that are not on your statement.

➤ MAKE SURE...

It may take up to two statement cycles for your outstanding expenses or auto-deductions to clear, so make sure you have enough funds and don't close your old account immediately.

Enter the **current balance** from your most recent statement: \$

List **deposits** that do not appear on your statement:

DATE: ____/____/____ \$

DATE: ____/____/____ \$

DATE: ____/____/____ \$

Add your current balance and recent deposits together: \$ **(A)**

List outstanding **checks, transfers, withdrawals or upcoming automatic deductions** that do not appear on your statement:

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

DESCRIPTION: _____ DATE: ____/____/____ \$

Add all these outstanding items together:
This is the amount you should leave in your old account. \$ **(B)**

Enter the amount from **(A)**: \$

Enter the amount from **(B)**: \$

Subtract **(B)** from **(A)**: \$

This is the amount you can transfer to your new Stock Yards Bank account.

Direct Deposit

Use this form to instruct your employer or other income sources to redirect recurring deposits like payroll into your Stock Yards Bank account.*

Follow these easy steps:

1. Attach a personal check from your new Stock Yards Bank account with the word "VOID" written in large letters in ink across the front. Do not sign the check.
2. Sign and date the form.
3. Submit to your employer or other fund originator.

EMPLOYEE NAME (PLEASE PRINT):

EMPLOYEE ID OR SOCIAL SECURITY NUMBER:

EMPLOYEE WORK PHONE NUMBER:

I wish to deposit to my Stock Yards Bank account: (Check one)

ENTIRE NET PAY _____ % OF NET PAY SPECIFIC AMOUNT: \$ _____ .00

ACCOUNT NUMBER:

CHECKING ACCOUNT MONEY MARKET ACCOUNT SAVINGS ACCOUNT

SYB OFFICE ADDRESS:

P.O. Box 32890

CITY, STATE, ZIP CODE:

Louisville, KY 40232-2890

SYB ABA ROUTING NUMBER:

083000564

I authorize

EMPLOYER OR FUND ORIGINATOR

to initiate credit entries and, if necessary, to initiate any debit entries and adjustments to correct any erroneous credit entries to my account at Stock Yards Bank.

SIGNATURE:

X

DATE:

I understand that this authorization will remain in full force and effect until the company named here has received written notification from me of its termination in such time as to afford the company and depository a reasonable opportunity to act.

* This authorization form is valid only to initiate a direct deposit of funds to a Stock Yards Bank & Trust Company account. Participation in direct deposit is contingent upon your employer or fund originator offering the service and your eligibility to participate.

HELPFUL INFORMATION

▶ TRACK YOUR REQUEST

To confirm that your check is being deposited into your Stock Yards Bank account go to www.syb.com, check your statement, or call our customer service center at 1-800-625-9066

▶ MAKE SURE...

Direct deposit should take effect within three deposit periods—if you don't see it by then, contact your employer. Keep your old account open until all direct deposits have been switched to your new Stock Yards Bank account.

Note that some organizations or companies (like Social Security) may require you to use a special form. Contact your employer or income source to make sure no other forms are required.

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Automatic Deposits

Use this form to instruct institutions to redirect recurring automatic deposits such as dividends, annuities, or periodic distributions from your retirement account.

Follow these easy steps:

1. Attach a personal check from your new Stock Yards Bank account with the word "VOID" written in large letters in ink across the front. Do not sign the check.
2. Sign and date the form.
3. Submit to each institution that is currently authorized to make automatic deposits to your account.

Attention:

INSTITUTION NAME:

INSTITUTION ADDRESS:

CITY, STATE, ZIP CODE:

To Whom It May Concern:

I have recently changed banks and need to have my automatic deposit switched to my new account at Stock Yards Bank. My information is as follows:

NAME ON ACCOUNT:

ACCOUNT NUMBER WITH YOUR INSTITUTION:

DEPOSIT AMOUNT: \$

I currently have my automatic deposits going to:

FINANCIAL INSTITUTION:

ACCOUNT NUMBER:

ABA ROUTING NUMBER:

Please switch my automatic deposits to this account: CHECKING SAVINGS

Your new Account Number:

Your new ABA Routing Number:

Effective: IMMEDIATELY BEGINNING DATE: ____/____/____

If you have any questions, please call me at: ()

► SIGNATURE: DATE:

HELPFUL INFORMATION

- **VERIFY THE FORM**
Contact each deposit source to make sure you are not required to use some special form.
- **FOLLOW UP...**
Automatic deposit should take effect within three deposit periods—if you don't see it by then, contact your income source.
- **CHECK YOUR ACCOUNT...**
To confirm that your check is being deposited into your Stock Yards Bank account go to www.syb.com, check your statement, or call our customer service center at 1-800-625-9066.
- **MAKE SURE....**
Keep your old account open until all automatic deposits have been switched to your new Stock Yards Bank account.

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Automatic Deductions

Use this form to have payments like gym membership fees and insurance premiums automatically deducted from your new Stock Yards Bank account.

Follow these easy steps:

1. Attach a personal check from your new Stock Yards Bank account with the word "VOID" written in large letters in ink across the front. Do not sign the check.
2. Sign and date the form.
3. Mail one form to each of the companies that is currently authorized to make automatic deductions from your account.

Attention:

COMPANY NAME:

COMPANY ADDRESS:

CITY, STATE, ZIP CODE:

To Whom It May Concern:

I have recently changed banks and need to have my automatic deductions switched to my new account at Stock Yards Bank. My information is as follows:

NAME ON ACCOUNT:

ACCOUNT NUMBER OR POLICY/MEMBER NUMBER:

DEDUCTION AMOUNT: \$

I currently have my automatic deductions made from:

FINANCIAL INSTITUTION:

ACCOUNT NUMBER:

ABA ROUTING NUMBER:

Please switch my automatic deductions to this account: CHECKING SAVINGS

Your new Account Number:

Your new ABA Routing Number:

Effective: IMMEDIATELY BEGINNING DATE: ____/____/____

If you have any questions, please call me at: ()

➤ SIGNATURE: DATE:

HELPFUL INFORMATION

➤ AUTOMATIC DEDUCTIONS?

These are recurring payments automatically withdrawn from your account on a regular basis. Examples are gym membership fees and insurance premiums.

➤ DIRECT DIAL...

Contact each company to find out the address of the main accounting office, where you should send that form. Make sure no other forms are required.

➤ CHECK YOUR ACCOUNT...

To confirm that this request has been followed, log into your Stock Yards Bank account go to www.syb.com, check your statement, or call our customer service center at 1-800-625-9066.

➤ MAKE SURE...

Keep your old account open until all automatic deductions have been switched over to your new Stock Yards Bank account.

Closing An Old Account

Use this form to notify your old bank that you are closing your account.

Follow these easy steps:

1. Fill out, sign and date this form.
2. Please make sure your new Stock Yards Bank account is active before you close your existing account.
3. Send this form to your old bank after all your existing checks, deposits, direct deposits, automatic payments and pre-authorized transfers have cleared.

HELPFUL INFORMATION

▶ THE TIME IS RIGHT WHEN...

Your last check, automatic deduction, and automatic deposit have cleared – you're ready to close your old account(s).

To Whom It May Concern:

Please close my bank account(s) as described below effective DATE: ____/____/____.

NAME ON ACCOUNT 1:

ACCOUNT NUMBER:

CHECKING MONEY MARKET SAVINGS

Please send me a Cashier's Check for the balance of this account.

For \$ payable to

CUSTOMER ADDRESS:

CITY, STATE, ZIP CODE:

If you have any questions, please call me at:

If applicable:

NAME ON ACCOUNT 2:

ACCOUNT NUMBER:

CHECKING MONEY MARKET SAVINGS

Please send me a Cashier's Check for the balance of this account.

For \$ payable to

CUSTOMER ADDRESS:

CITY, STATE, ZIP CODE:

▶ SIGNATURE: DATE:

▶ JOINT ACCOUNT HOLDER SIGNATURE: DATE:

Switch Checklist

Use this form to track and verify the various transactions you are moving to your new account at Stock Yards Bank.

As you send out each form, make a note of when you sent it and when you should check that the switch has been made.

Direct Deposits/Automatic Deposits:

COMPANY NAME & PHONE NUMBER	DATE LETTER MAILED	ESTIMATED SWITCH DATE	VERIFIED
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Automatic Deductions:

COMPANY NAME & PHONE NUMBER	DATE LETTER MAILED	ESTIMATED SWITCH DATE	VERIFIED
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

HELPFUL INFORMATION

➤ **HOW LONG DOES IT TAKE?**
When should you expect the switch to take effect? Remember, estimate about two months from the time the company receives the form you filled out and sent it.