



# LAKESTONE

## BANK & TRUST

### “Make the Switch” Instructions

**1. Fill out all requested information on the “Make the Switch Form.”** To complete the application process bring this form and your photo I.D. to your local Lakestone branch. (Sorry, due to banking regulations, you will need to complete your new account opening with an in-branch visit. For security purposes, please DO NOT fax or email the “Make the Switch Form”. We look forward to seeing you soon at any one of our convenient locations

<b>MAIN OFFICE</b> 810.664.2977 83 W. Nepessing St. Lapeer, MI 48446	<b>ATTICA OFFICE</b> 810.724.6436 4515 Imlay City Rd. Attica, MI 48412	<b>ELBA OFFICE</b> 810.653.2106 5508 Davison Rd. Lapeer, MI 48446	<b>IMLAY CITY OFFICE</b> 810.724.4652 1875 S. Cedar St. (M-53) Imlay City, MI 48444	<b>SOUTH MAIN OFFICE</b> 810.664.9986 637 S. Main St., Lapeer, MI 48446
<b>ALMONT OFFICE</b> 810.798.2200 5515 Van Dyke Rd. Almont, MI 48003	<b>CAPAC OFFICE</b> 810.395.1152 206 North Main St. Capac, MI 48014	<b>EMMETT OFFICE</b> 810.384.8400 3177 Main St. Emmett, MI 48022	<b>MEMPHIS OFFICE</b> 810.392.9922 81111 Main St. Memphis, MI 48041	<b>YALE OFFICE</b> 810.387.3229 3 North Main St. Yale, MI 48097
<b>ARMADA OFFICE</b> 586.784.4200 72890 North Ave. Armada, MI 48005	<b>DEERFIELD OFFICE</b> 810.793.6311 30 W. Burnside Rd. Fostoria, MI 48435	<b>DOWNTOWN IMLAY CITY OFFICE</b> 810.724.6000 148 North Almont Ave. Imlay City, MI 48444	<b>METAMORA OFFICE</b> 810.678.3373 3414 S. Lapeer Rd. Metamora, MI 48455	

**2. Stop using your old account.** Be sure to leave sufficient funds in the account until all outstanding checks and automatic payments have cleared. Destroy any unused checks, debit cards and deposit slips.

**3. Change direct deposits.** Use the “**Make the Switch** – Direct Deposit Form” and give it to your employer or your retirement plan. Include a new Lakestone deposit ticket or voided check. For Social Security, direct deposit changes call 800.772.1213.

**4. Change automatic payments.** Use the “**Make the Switch** - Change Automatic Payments” form to change all automatic withdrawals or automated payment services. Print the number of copies you need to change all your payments.

**5. Close your old account.** Send the “**Make the Switch** – Authorization to Close Account” form to your previous financial institution to close your accounts. If, after all your checks have cleared, you have a remaining balance, they will send you a check. It is just that simple.

*Still have questions?*

Visit or call your local Lakestone Bank & Trust branch.

**Now more than ever, local banking makes sense!**  
**Welcome to Lakestone Bank & Trust!**



# LAKESTONE

BANK & TRUST

## “Make the Switch” Form

*The information requested on this form is considered confidential. For this reason, we are asking you to fill out and print this form and bring it to your local branch office. Stop in to show your identification, sign forms and make a deposit to open your account.*

### INDIVIDUAL / PRIMARY ACCOUNT HOLDER

Name \_\_\_\_\_ Email \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

**\* Please Note: Federal regulation requires that Lakestone Bank & Trust have on file verification of customer’s identification. Please be prepared to have our customer service staff review driver’s license or other photo identification when requested.**

The information I have provided is correct to the best of my knowledge. I authorize Lakestone Bank & Trust to check credit and/or employment history should it deem necessary.

Signature \_\_\_\_\_ Date \_\_\_\_\_

### JOINT ACCOUNT HOLDER

Name \_\_\_\_\_ Email \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Mailing Address (if different) \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Home Phone \_\_\_\_\_ Work Phone \_\_\_\_\_

**\* Please Note: Federal regulation requires that Lakestone Bank & Trust have on file verification of customer’s identification. Please be prepared to have our customer service staff review driver’s license or other photo identification when requested.**

The information I have provided is correct to the best of my knowledge. I authorize Lakestone Bank & Trust to check credit and/or employment history should it deem necessary.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**“Make the Switch” to  
Lakestone Bank & Trust today!**



## "Make the Switch" Direct Deposit

*Please fill out and print as many forms as needed. Please attach a copy of a voided check from your new account.*

Date \_\_\_\_\_

Company Name \_\_\_\_\_

You are currently depositing \_\_\_\_\_ Deposit Type-  paycheck  social security  other

**Into the following account:** Bank Name \_\_\_\_\_

Routing Number \_\_\_\_\_ Account Number \_\_\_\_\_

I authorize you to redirect this automatic deposit into my new account effective (Date) \_\_\_\_\_

### **NEW BANK- Lakestone Bank & Trust**

Routing Number 072403046 Account Number \_\_\_\_\_

If you have any questions, you may contact me at the following phone number

Preferred Phone Number \_\_\_\_\_  Day  Evening  Cell

**Sincerely,**

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (please print) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_



## “Make the Switch” Change Automatic Payments

*Please fill out and print as many forms as needed. Please attach a copy of a voided check from your new account.*

Date \_\_\_\_\_

I have recently switched banks.

You are currently withdrawing \$ \_\_\_\_\_ for (reason) \_\_\_\_\_ on  
the \_\_\_\_\_ day of each month, from Bank \_\_\_\_\_ account number \_\_\_\_\_.

I authorize you to STOP deducting my automatic payment from the bank listed above on (Date) \_\_\_\_\_.

I authorize you to BEGIN deducting my automatic payment from:

### NEW BANK-

#### Lakestone Bank & Trust

Routing Number \_\_\_\_\_ 072403046 \_\_\_\_\_ Account Number \_\_\_\_\_

If you have any questions, you may contact me at the following phone number

Preferred Phone Number \_\_\_\_\_  Day  Evening  Cell

**Sincerely,**

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (please print) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_



# “Make the Switch” Authorization to Close Account

Please fill out and print as many forms as needed. Please attach a copy of a voided check from your new account.

To (financial institution) \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Please accept this letter as authorization to close the account(s) indicated below.

Please close my:

Checking account number	Savings account number	Other
_____	_____	_____

Please send me a check for the remaining balance. OR

Please send Lakestone Bank & Trust (Routing Number 072403046) a check for the remaining balance and credit my account number: \_\_\_\_\_

If you have any questions, you may contact me at the following phone number

Preferred Phone Number \_\_\_\_\_  Day  Evening  Cell

**Sincerely,**

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (please print) \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_