



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

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

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“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 _____