Personal Account Switch Kit

It is our goal at Liberty Bank to make it as simple as possible for you to transfer over your personal accounts. For added convenience, we have included all of the required forms in this switch kit.

Simply follow these steps:

☑ Step 1 - About You

Complete the Consumer Account Application and provide copies of your government issued identification, trust documents (if applicable), and power of attorney (if applicable).

☑ Step 2 - Visit Liberty Bank

We are available by appointment if you would like to meet face to face during office hours. You can also send us everything electronically via secure email or fax. A Professional Banker will review your documents and assist you in selecting the accounts and services that are right for you.

☑ Step 3 - Direct Deposits

Complete the enclosed Direct Deposit Change Form and provide copies to your Employer, Pension Plan Administrator, and/or Social Security Administration Office.

☑ Step 4 - Automatic Payments

Complete the enclosed Automatic Payment Transfer Form. Mail a copy of this form, along with a cancelled check from your new Liberty Bank account, to every business and merchant who debits your account for payment.

☑ Step 5 - Don't Forget

Wait 30 days to close your old accounts. Make sure that sufficient funds remain in the account to cover any outstanding transactions. Once you are certain that everything has cleared, we have provided a closing letter to assist in the process of closing your old accounts.