



Switch Kit

Don't just bank better. Switch banks better.

That's our goal: to make your experience of switching to LBT as smooth as possible. Follow the simple steps below for a better transition experience, **and feel free to call in our help at any point along the way!**

☐ Open Your New Account

Opening your new LBT account is the first step to a successful switch. Simply fill out the form included with this kit and return to an LBT customer service representative. They will take care of the account setup process and even get you a debit card that day! The form may also be emailed to info@lbt.com. Just come into LBT at your convenience to complete the setup process. Be sure to bring a photo ID and either \$100 as your opening checking deposit or all information needed to set up direct deposit.

☐ Redirect Your Direct Deposits

You'll need to re-route deposits like your paycheck or Social Security benefits to your new account. Typically, you can do that online or by phone with whomever is making the deposit; however, if you'd rather do it by mail, we've included a form to use. Along with the form, it's a good idea to include a voided LBT check or deposit slip because depositors will often require it.

☐ Update Your Automatic Payments

Be sure to update your billing info for automatic transactions. To start, review your bank statements for the past year and jot down every automatic payment. You're looking for two types:

1. **Payments you set up in your former bank's online bill pay system.** Updating these requires two steps. First, schedule the payments through LBT's bill pay, and second, turn them off in your old account. We'd be glad to help with these steps.
2. **Payments set up elsewhere that automatically withdraw from your account.** For these, you'll simply need to provide the biller the details of your new bank account. Typically, that's done online or by phone, but we've included a form if you'd rather do it by mail. Be sure to include a voided LBT check or deposit slip.

☐ Close Your Old Account

But not immediately. Keep it open for a couple of months, and if possible, leave some cushion money to satisfy a minimum balance requirement or to cover any unexpected transaction that didn't get switched over to your new account.

Then close it. The steps to close and withdraw your money vary by bank, but here are three must-dos:

1. Tell the bank to officially close the account. If you'd prefer to notify them by mail instead of in person or by phone, we've included a form letter to use.
2. Have the bank provide written confirmation of the account closure.
3. Destroy your old checks, debit cards, and deposit slips. We can even do that for you if you'd like!

That's it, but please let us know if we can help with any of these steps. Thank you!



Open Your New Account

Please check all that you would like to open.

☐ Savings Account ☐ Checking Account ☐ Certificate of Deposit ☐ Other: _____

Individual Account

Name of Primary Account Holder

Social Security Number

Date of Birth

Address

City State Zip Code

Mailing Address (if different)

Driver's License Number Expiration Date

Phone Number

Email Address

Employer

Joint Account

Name of Joint Account Holder

Social Security Number

Date of Birth

Address

City State Zip Code

Mailing Address (if different)

Driver's License Number Expiration Date

Phone Number

Email Address

Employer

Beneficiary Designation (not required)

Beneficiary Name	Contact Information	Date of Birth	Social Security Number
Beneficiary Name	Contact Information	Date of Birth	Social Security Number
Beneficiary Name	Contact Information	Date of Birth	Social Security Number
Beneficiary Name	Contact Information	Date of Birth	Social Security Number

Why did you choose Lamar Bank and Trust?

Note: Valid photo identification is required of all applicants when opening new accounts





Redirect Your Direct Deposits

Company Name

Company Address

City

State

Zip Code

RE: Switching My Direct Deposit Attn: Accounts Payable/Accounting

I have recently changed banks and would like to have my direct deposit changed to my new account.

Please discontinue my current direct deposit and begin making direct deposit(s) into my new Lamar Bank and Trust account. If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Authorized Signature

(Original signature authorized to make change)

Date

Direct Deposit Information

Name

Phone: Day / Evening

Address

City

State

Zip Code

Old Bank Name

Old Routing Number

Lamar Bank and Trust

New Bank Name

101202875

New Routing Number

Old Account Number

1000 Broadway, PO Box 190, Lamar, MO 64759

New Bank Address

New Account Number

Amount of Deposit(s)

Date of Deposit(s)



Update Your Automatic Payments

Company Name (Payee)

Company Address

City

State

Zip Code

RE: Switching My Automatic Payment Attn: Accounts Receivable/Accounting

I have recently changed banks and would like to have my automatic payments with your company changed to my new account. Please discontinue debiting the below account and begin making automatic withdrawals from my new Lamar Bank and Trust account.

If you have any questions regarding this request, please contact me by mail or call me at the phone number listed below. Thank you for your prompt assistance in this matter.

Authorized Signature

(Original signature authorized to make change)

Date

Automatic Payment Information

Name

Phone: Day / Evening

Address

City

State

Zip Code

Old Bank Name

Old Routing Number

Lamar Bank and Trust

New Bank Name

101202875

New Routing Number

Old Account Number

1000 Broadway, PO Box 190, Lamar, MO 64759

New Bank Address

New Account Number

Reason for Payment

Amount of Payment

Date of Payment



Deposits & Payments Organizer

Use this page to keep track of all the information you need to switch your direct deposits and automatic payments to your new Lamar Bank and Trust account.

LBT Account Number

101202875

LBT Routing Number

Direct Deposits

Company Name & Address	Date Mailed Letter	Estimated Switching Date (Assume 2 Months)	Status

Automatic Payments

Company Name & Address	Date Mailed Letter	Estimated Switching Date (Assume 2 Months)	Status



Close Your Old Account

Bank Name

Bank Address

City

State

Zip Code

RE: Closing My Account(s) Attn: Account Maintenance

This letter is to inform you I am closing my account(s) at your bank. Please close the following account(s) listed below and send a check for the remaining balance(s) to my address. If you have any questions regarding this request, please contact me by mail or at the phone number listed below. Thank you for your prompt assistance in this matter.

Authorized Signature
(Original signature authorized to make change)

Date

Account Information

Name

Phone

Address

City

State

Zip Code

Checking Account Number(s)

Savings Account Number(s)
