

***Use this planner to gather all the information you will need to simplify your move to First State Bank!***

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY, STATE, ZIP: \_\_\_\_\_

ROUTING/ABA #: 082902003

CHECKING ACCOUNT #: \_\_\_\_\_

SAVINGS ACCOUNT #: \_\_\_\_\_

BANK NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY, STATE, ZIP: \_\_\_\_\_

CHECKING ACCOUNT #: \_\_\_\_\_

SAVINGS ACCOUNT #: \_\_\_\_\_

☐ DIRECT DEPOSIT  
(Payroll, Social Security, Retirement, etc.)

☐ **AUTOMATIC PAYMENTS**  
(Insurance, utility payments, gym, etc.)

☐ ONLINE BANKING/ BILL PAY

If you have or wish to have any direct deposits from Social Security, Retirement Benefits, or your employer directly deposited into your new First State Bank account, please list them below.

## AUTOMATIC PAYMENT INFORMATION

If you have any payments to set up or transfer to your First State Bank personal checking account, list them below. Such as, utilities, insurance premiums, gym memberships, car payments, etc.)

[illegible]