

# Make The Switch To



## IdahoTrust Bank

### **Step 1- Open Your Idaho Trust Account**

Complete the new account form included in the packet and bring to your nearest Idaho Trust Branch.

### **Step 2- Set Up Direct Deposit**

Complete the attached Direct Deposit form and take the form to your employer's payroll department so your funds can be automatically deposited into your Idaho Trust account.

### **Step 3- Change Over Automatic Payments**

Use the Automatic Payment Change form to change all automatic payments, such as car loans over to your new account.

### **Step 4- Close Your Old Account**

Fill out the Close Account form and submit to your old financial institution. Ensure that all checks and transactions have cleared before the account is closed.

# Step 1- Open New Account

Individual Account     Business Account     Other: \_\_\_\_\_

## Primary Account Holders Information

\_\_\_\_\_  
First Name      Middle      Last Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Mailing Address (if different)

\_\_\_\_\_  
Home Phone      Mobile Phone

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Mother's Maiden Name

\_\_\_\_\_  
Date of Birth      Birth City

\_\_\_\_\_  
Drivers License Number      State

\_\_\_\_\_  
Issue Date      Expiration Date

\_\_\_\_\_  
Source of Business

\_\_\_\_\_  
Occupation      Employer

\_\_\_\_\_  
Second Form of ID (Credit Card, Military Card, Passport)

\_\_\_\_\_  
Number      Issue Date

\_\_\_\_\_  
Expiration Date

## Secondary Account Holders Information

\_\_\_\_\_  
First Name      Middle      Last Name

\_\_\_\_\_  
Street Address

\_\_\_\_\_  
City, State, Zip

\_\_\_\_\_  
Mailing Address (if different)

\_\_\_\_\_  
Home Phone      Mobile Phone

\_\_\_\_\_  
Email Address

\_\_\_\_\_  
Social Security Number

\_\_\_\_\_  
Mother's Maiden Name

\_\_\_\_\_  
Date of Birth      Birth City

\_\_\_\_\_  
Drivers License Number      State

\_\_\_\_\_  
Issue Date      Expiration Date

\_\_\_\_\_  
Source of Business

\_\_\_\_\_  
Occupation      Employer

\_\_\_\_\_  
Second Form of ID (Credit Card, Military Card, Passport)

\_\_\_\_\_  
Number      Issue Date

\_\_\_\_\_  
Expiration Date

### Business Accounts Only:

\_\_\_\_\_  
Tax Identification Number

\_\_\_\_\_  
Entity's Address

\_\_\_\_\_  
City, State      Zip Code

\_\_\_\_\_  
Entity's Phone Number:

### Additional Services:

- Debit Card
- Online Banking
- E-statements

Please note that primary and secondary account holders will need to sign an official account form in person before account can be open. An opening deposit will be required.

## Step 2- Change Direct Deposits

Complete this form and submit to any company or organization who is automatically depositing funds to your existing account (payroll, pension, or dividends).

Employee Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

Please have my payroll check automatically deposited into the following Idaho Trust Account(s):

Checking     Savings     Money Market

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

Idaho Trust Routing Number #124103841

Deposit Percentage \_\_\_\_\_ or Amount \_\_\_\_\_

Checking     Savings     Money Market

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

Idaho Trust Routing Number #124103841

Deposit Percentage \_\_\_\_\_ or Amount \_\_\_\_\_

I Authorize \_\_\_\_\_

NAME OF BUSINESS

and **Idaho Trust Bank** to automatically deposit my payroll check into my account(s) listed above. This authorization will remain in effect until I give written notice to cancel it.

Customer Signature \_\_\_\_\_

Date \_\_\_\_\_

**ATTACHED VOIDED CHECK**

## Why Direct Deposit?

### It's Convenient and Saves Time

- Your checks are automatically deposited into your account
- It eliminates trips to the bank
- Your money is available in your account on payday
- No more misplaced checks

## Step 3- Transfer Automatic Payments

**Current Account Number** \_\_\_\_\_

Please redirect my automatic payment for the above account number to my new bank account as instructed below.

**Account Type:**  Checking  Savings  Money Market  
**Effective:**  Immediately  Beginning    /   /     
mm/dd/yyyy

### My New Idaho Trust Bank Account Information:

New Account Number \_\_\_\_\_

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

If you have any questions about this request, please contact me at: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Co-Signer (if applicable)

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## Step 3- Transfer Automatic Payments

**Current Account Number** \_\_\_\_\_

Please redirect my automatic payment for the above account number to my new bank account as instructed below.

**Account Type:**  Checking  Savings  Money Market  
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mm/dd/yyyy

### My New Idaho Trust Bank Account Information:

New Account Number \_\_\_\_\_

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

If you have any questions about this request, please contact me at: \_\_\_\_\_

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Co-Signer (if applicable)

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

## Step 4- Close Old Account

**Complete this form and submit to your previous financial institution.  
Make sure all checks have cleared.**

**To:**

Financial Institution \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_

Zip \_\_\_\_\_

**From:**

Primary Account Holder: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Secondary Account Holder: \_\_\_\_\_

**This document serves as an authorization to close the following account(s) with  
your Institution:**

Account # \_\_\_\_\_

Account Type \_\_\_\_\_

Account # \_\_\_\_\_

Account Type \_\_\_\_\_

Account # \_\_\_\_\_

Account Type \_\_\_\_\_

**All remaining balances should be sent to me at:**

**Idaho Trust Bank** F/B/O \_\_\_\_\_

Attention: \_\_\_\_\_

888 W Broad Street, Boise, Idaho 83702

Bank Routing # 124103841

New Client Account # \_\_\_\_\_

**Myself** Address for check \_\_\_\_\_

\_\_\_\_\_  
Primary Account Holder Signature

\_\_\_\_\_  
Secondary Account Holder Signature

\_\_\_\_\_  
Date



# IdahoTrust Bank

## **Boise Branch**

888 W. Broad Street  
Boise, ID 83702

**Phone:** (208) 373-6500

**Fax:** (208) 373-7635

**Toll-free:** 1-800-549-3333

**Lobby Hours:** Mon-Fri 9:00am-5:00pm

**Drive Thru:** Mon-Fri 8:30am-5:00pm

## **Coeur d'Alene Branch**

622 E. Sherman Avenue  
Coeur d'Alene, ID 83814

**Phone:** (208) 664-6448

**Fax:** (208) 765-6962

**Toll-free:** 1-800-664-6448

**Lobby Hours:** Mon-Fri 8:00am-5:00pm

**Drive Thru:** Mon-Fri 8:00am-5:00pm

## **Las Vegas Trust Office**

2850 W. Horizon Ridge Pkwy, Ste. 200  
Henderson, NV 89052

**Phone:** (702) 430-4747

[www.IdahoTrust.com](http://www.IdahoTrust.com)

Member FDIC

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