



Switch with Confidence: We pinky promise it's worth it.

Connection Bank Switch Kit



CONNECTION
— BANK —

We've got this.



When was the last time you heard someone shout, "My bank is the best!"? Well, get ready to shout it yourself once you switch to Connection Bank. We know it's not just about money; you're trusting us with your hopes and dreams at all different stages of your life! We commit to you so you'll always feel comfortable with the investment you've made here – We've got this!



Our Value

At Connection Bank, we take pride in the value we bring to our community. With our commitment to inclusivity, we offer checking accounts tailored for everyone, ensuring financial accessibility. By fostering strong connections, we strive to enhance the financial well-being of our community members.

Our Service

Our team of experienced and knowledgeable bankers are ready to welcome you with a smile. Switching to Connection Bank has never been more convenient with our user-friendly Switch Kit!

Say goodbye to the banking blues as we guide you through the steps to make the switch to Connection Bank. **We've got you every step of the way!**

1 **Open your new account at Connection Bank.** Stop by your local Connection Bank to open your new checking account. Our staff will assist you in finding an account that fits all of your banking needs - we've got it all here! Stop using your old checking account and let the checks you have written go through. This approximately takes two weeks.

2 **Get organized.** Use our handy-dandy switch kit checklist to organize all transactions that will be switched to your new Connection Bank account.

3 **Transfer your direct deposits.** To transfer your direct deposits to your Connection Bank account, complete the "Direct Deposits," form and give it to your employer or any other sources. This will ensure that your funds will now be deposited into your Connection Bank account. Contact your employer if you have questions about their process.

4 **Move your automatic payments.** To request the transfer of your automatic payments to your Connection Bank account, complete the "Automatic Payments," form. Allow time for your first payments to be activated.

5 **Close your old account.** Complete the "Close Your Account," form to notify your previous bank once you have made sure all direct deposits and automatic payment requests have been processed.

Please keep in mind: Connection Bank cannot guarantee each form will be accepted in every instance. Some companies may have their own procedures to make these changes. **Please do not hesitate to contact us with questions or stop in at one of our branches.**

Get Organized - Checklist

Direct Deposits: List all direct deposits to your account(s):

Type	Company	Account Number	Amount	Date

Example(s): Employer Payroll, Social Security, Pension/Retirement, Investment/Brokerage

Automatic/Online Payments: List all withdrawals from your account(s):

Type	Company	Account Number	Amount	Date

Example(s): Home/Auto/Life Insurance, Electric, Phone, TV/Internet, Mortgage, Credit Card, Water

HELPFUL TIPS
**Gather your most recent statement from your old financial institution, or a couple months worth. If applicable, include statements/information for utility payments, loan payments, health club memberships, etc. that you have set up with your old account.
**You will want to keep track of the activity on your old account. Make sure that all checks, deposits, automatic payments, debit card transactions and ATM withdrawals have cleared before closing the account.



Form 1 - Transfer Your Direct Deposits

Change your direct deposits to Connection Bank.

To transfer your direct deposits to your Connection Bank account, complete the “Direct Deposits,” form and give it to your employer or any other sources. This will ensure that your funds will now be deposited into your Connection Bank account. Contact your employer if you have questions about their process.

For Social Security deposits, please call the Social Security Administration at (800) 772-1213.



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Date:

To whom it may concern:

The following information is for _____ direct deposit into their _____ account at Connection Bank.

Routing number – 073901314

Account number – _____

If you need any additional information, please contact Connection Bank.

Sincerely,

_____ at Connection Bank.

Title: _____



Form 2 - Transfer Your Automatic Payments

Change your automatic payments to Connection Bank.

To request the transfer of your automatic payments to your Connection Bank account, complete the “Automatic Payments,” form. Allow time for your first payments to be activated.

Contact the company if you have questions about their process.

Automatic Payments



CONNECTION
BANK
We've got this.

Date:

To whom it may concern:

The following information is for _____ automatic transfer
from their _____ account at Connection Bank.

Routing number – 073901314

Account number – _____

If you need any additional information, please contact Connection Bank.

Sincerely,

_____ at Connection Bank.

Title: _____



Form 3 - Close Your Account

Close Your Old Bank Account!

Once your checks have cleared and you've changed your deposits and payments, say goodbye to your old bank!

Complete the "Close Your Account," form to notify your previous bank once you have made sure all direct deposits and automatic payment requests have been processed. This could take up to 1-2 months.

Close Your Account



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BANK
We've got this.

Date:

To whom it may concern:

The following information is for _____ to close their account at _____.

Account number – _____

Sincerely,



Thank you for choosing Connection Bank!

New account, new vibes!

Share your experience with others by leaving a review on Google or Facebook!

Stay Connected!



on Facebook @ Connection Bank



on Instagram @ myconnectionbank



on LinkedIn @ Connection Bank

Connection Bank Locations & Hours

Burlington

115 Legacy Drive
Burlington, IA 52601

319-752-5587

Lobby Hours:

Monday - Friday: 8:30 - 5:00

Drive Up Hours:

Monday - Thursday: 8:30 - 5:00

Friday: 8:30 - 5:30

Keokuk

2119 Main Street
Keokuk, IA 52632

319-524-2944

Lobby Hours:

Monday - Friday: 8:30 - 5:00

Drive Up Hours:

Monday - Thursday: 8:30 - 5:00

Friday: 8:30 - 5:30

Fort Madison - Downtown

636 Avenue G
Fort Madison, IA 52627

319-372-5164

Lobby Hours:

Monday - Friday: 8:30 - 5:00

***Teller Line inside closes at 3:00

Drive Up Hours:

Monday - Thursday: 8:30 - 5:00

Friday: 8:30 - 5:30

Fort Madison - River Hills

1206 48th Street
Fort Madison, IA 52627

319-376-1251

Lobby Hours:

Monday - Friday: 8:30 - 5:00

Drive Up Hours:

Monday - Thursday: 8:30 - 5:00

Friday: 8:30 - 5:30

Montrose

121 S. First Street
PO Box 189 Montrose, IA 52639

319-463-5455

Lobby Hours:

Monday - Friday: 8:30 - 5:00

Drive Up Hours:

Monday - Thursday: 8:30 - 5:00

Friday: 8:30 - 5:30



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