

GET STARTED BANK CLOSE TO HOME

Joining Roxboro Savings Bank doesn't have to be difficult. In fact, it should be easy. Which is why we've put together this "GET STARTED" kit to make the process smoother for you.



Roxboro
Savings Bank

Come closer to home



OUR UPBRINGING BRINGS EVERYONE UP

To us, quality of service has a great deal to do with upbringing. Having Roxboro roots, values and a promise to grow our community in the process, creates a one-of-a-kind banking experience you—and others who share our corner of the world—can appreciate.

So expect all-around easier processes and faster approvals. And enjoy more care and closeness between you and your financial dreams. With Roxboro Savings Bank, it's all just around the corner.

ABOUT YOU

Chances are, we already knew who you were right when you walked in the door. But seeing that you're going to be opening an account with us, let's make it official and gather more information.

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Home Phone _____

Cell Phone _____

Work Phone _____

Email _____

Driver's License # _____ State _____ Exp: _____

Social Security # _____

Date of Birth _____

Birth City _____ State _____

Employer _____

Occupation _____

Initial Deposit Amount _____

* If this is a joint account see next page

JOINT ACCOUNT

Please fill out this information for the secondary member of a joint personal account in addition to the form on previous page.

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Home Phone _____

Cell Phone _____

Work Phone _____

Email _____

Driver's License # _____ State _____ Exp: _____

Social Security # _____

Date of Birth _____

Birth City _____ State _____

Employer _____

Occupation _____

Initial Deposit Amount _____

* If this is a joint account see next page

ABOUT YOUR BUSINESS

We've been a part of the Roxboro business community for more than 80 years. Tell us a little more about your business and we can start helping you grow and succeed.

Business Name _____

Main Contact _____

Mailing Address _____

Work Phone _____

Email Address _____

EIN/Tax ID # _____

S.O.S.N.C.com _____

List of Officers _____

Checks written & received (monthly average) _____

Deposits made (monthly average) _____

Initial Deposit Amount _____

*Please provide a copy of your Business Resolutions

1. Close Your Old Account

- Make sure any outstanding checks or payments have cleared.
- Ask your previous financial institution to close out your old accounts.
- Ask your previous financial institution for a check with your remaining balance.
- Destroy your old ATM/debit cards and checkbooks from your previous account. Shred the old checks and cut up the debit cards. Although those accounts are not active, they still put you at risk for identity theft so make sure to destroy anything with account information.

2. Change Your Direct Deposits

**** See page 6 for Direct Deposit Change Request Form***

3. Update Your Automatic Payments

Whether it's for Piedmont Electronic or Carolane Propane, don't forget to transfer your automatic payments from your old accounts to your new Roxboro Savings Bank account.

**** See page 7 for Automatic Payment Transfer Letter***

**DIRECT
DEPOSIT**

DIRECT DEPOSIT CHANGE REQUEST FORM

Please complete the following form and return it to us along with a voided check or deposit slip.

Name _____

Social Security Number _____

Mailing Address _____

City _____ State _____ Zip _____

Company Name _____

Company Address _____

Deposit Instructions

Please change my direct deposit with your institution to the following:

Roxboro Savings Bank

Transit/ABA Number 253171294

Account Number _____

Customer Signature _____

Date _____

AUTOMATIC PAYMENT TRANSFER LETTER

Please complete the following form and send it to your providers for utilities and bills paid by automatic deposit.

Dear (Vendor) _____

This letter is to inform you that I am changing banks. I currently have my payments automatically withdrawn from:

Old bank/account number _____

I would like to transfer my monthly payments to be withdrawn from my new account at Roxboro Savings Bank

ABA Routing Number 253171294

New account number _____

Please begin this new draft effective:

Date _____

Sincerely:

Name _____

Mailing Address _____

City _____ State _____ Zip _____

Phone _____

Signature _____

Date _____



Roxboro Savings Bank

Come closer to home

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