

Getting Started

Welcome! We're glad you're here.

Switching bank accounts can be cumbersome. We're here to help. You can make the switch to Shamrock Bank in three easy steps. Use this handy kit to move your money, update your payments, and close your old account. We look forward to serving you!

1 Open your new account.

Apply for an account online at shamrockbank.com, or visit a Customer Service Representative at your local branch to help get you started.

2 Switch your direct deposits and automatic withdrawals.

Complete the **Direct Deposit Request** and the **Automatic Withdrawal Authorization** to switch your automatic payments and deposits.

Automatic Withdrawal Checklist:

Mortgage Insurance Investments
 Auto Loans Cable/Internet Memberships
 Utilities Credit Cards Subscriptions

Direct Deposit Checklist:

Payroll Social Security
 Investments (see Instructions on Direct Deposit Form)
 Retirement Plans

3 Close your old account.

Complete the **Close Account Form** and send it to your former bank. Your remaining balance will be transferred to your new Shamrock Bank account.



Coalgate 580.927.2311 Caddo 580.367.2258 Mountain View 580.347.2801 Clayton 918.569.4181 Altus 580.477.2800 Apache 580.588.3361 Durant 580.924.0022 OKC 405.297.4400

shamrockbank.com | [@shamrockbankna](https://twitter.com/shamrockbankna)

Direct Deposit Request

Use this form to authorize your employer, retirement, or any other agency to deposit your payment directly into your Shamrock Bank account. Use one form for each deposit. Or, many companies allow you to change bank account information on their payroll or investment platform.

Special Instructions for SOCIAL SECURITY benefits: Update your bank account information by logging into your "my Social Security" account or by visiting a local Social Security office in person. The SSA no longer accepts bank account changes over the phone or direct deposit forms.

Company or Employer :

Address :

City, State, Zip :

Please accept this as my notice that I have changed my financial institution and need to update my bank account information. Effective immediately, please make all future deposits into my account with Shamrock Bank NA.

Bank Name: **Shamrock Bank NA**

Bank Routing Number: **103101547**

Bank Account Number: _____ Type: Checking Savings

Signature :

Printed Name :

Address :

City, State, Zip :

Phone Number :

If you need any further information, such as a voided check, or if you prefer I submit this information using an alternate method, please let me know. Thank you for updating my information.



Automatic Withdrawal Authorization

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your bank account. A form is needed for each automatic withdrawal. Or, many companies make it easy to change your account on their online platform or website.

Company Name :

Address :

City, State, Zip :

Effective immediately, please **cancel** all automatic withdrawals from my **old financial institution**:

Bank Name:

Bank Routing # :

Account # :

Effective immediately, please make all automatic withdrawals from my **new financial institution**:

Bank Name: **Shamrock Bank NA**

Bank Routing Number: **103101547**

Bank Account Number: _____ Type: ___ Checking ___ Savings

Signature :

Printed Name :

Address :

City, State, Zip :

Phone Number :

If you need any further information, such as a voided check, or if you prefer I submit this information using an alternate method, please let me know. Thank you for updating my information.



Close Account Form

Use this form to close your account(s) at your former financial institution. Make sure that all checks and transactions have cleared. You can choose to have your funds sent directly to your account at Shamrock Bank, or mailed to you via a cashiers check.

Financial Institution :

Address :

City, State, Zip :

To Whom It May Concern:

Please close the following account(s) and any associated products or services to the account(s) listed.

Account # : **Account # :**

Account # : **Account # :**

Please send remaining balance to (check desired option):

Deposit directly to my new account at Shamrock Bank.

Account # : **Routing # :**

Type : **Checking** **Savings**

Mail me a check to my address listed below.

Signature : **Date:**

Printed Name :

Address :

City, State, Zip :

Phone Number :

If you need any further information or if you prefer I submit this information using an alternate method, please let me know. Thank you for updating my information.