



Phone: (601) 264-1467  
Toll Free: (800) 300-1467  
P. O. Box 16988 | Hattiesburg, MS 39404  
www.grand.bank

# Thank you for choosing Grand.bank®!

## Welcome to Grand.bank®

Welcome to Grand.bank®, a trademark of Grand Bank for Savings, FSB, Member FDIC. With roots dating back to 1968, we have built a rich history of innovation and forward-thinking, by consistently offering unique financial products tailored to meet the diverse needs of our customers.

Today, we continue to grow by providing affordable and innovative financial solutions designed to meet our customers' needs. Our commitment to our customers and communities drives everything we do, pushing us to develop products and services that truly make a difference.

[Visit grand.bank to learn more](http://www.grand.bank)

### THIS KIT INCLUDES THE FOLLOWING FORMS TO HELP YOU SWITCH YOUR ACCOUNT TO GRAND.BANK®

- Account balance worksheet
- Companies to notify of change
- Automatic payment/withdrawal change notice
- Direct deposit change notice

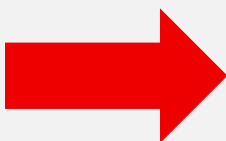
### OUR MISSION

At Grand Bank for Savings, F.S.B. (Grand.bank), our mission is clear: to enhance the financial well-being of more than one million members of underserved and historically underrepresented communities nationwide by 2030. We are dedicated to breaking the cycles of harmful debt, fostering savings growth, promoting homeownership, and empowering individuals and families to build generational wealth.

We believe that everyone deserves access to financial opportunities that can improve their lives and future. Through innovative solutions and a customer-first approach, we strive to create lasting change, one step at a time.

## 3 Easy Steps!

1. **Open your new account and switch automatic deposits and payments**
2. **Balance and continue monitoring your old account until all outstanding transactions have cleared**
3. **After confirming all transactions and deposits have cleared, close your old account**



# Account balance worksheet

Use this worksheet to help you balance your account before closing. Beginning with the account balance shown on your most recent bank statement, balance your existing account. Note: You must maintain sufficient balances in your old account until all outstanding items clear.

1. Balance from your most recent bank statement \$ \_\_\_\_\_

2. List deposits since statement closing date

Date	Description	Amount

Total deposits \$ \_\_\_\_\_

3. List all checks, debit card purchases, ATM withdrawals, automatic debits, and bank fees since your last statement

Date	Description	Amount

Total debits \$ \_\_\_\_\_

4. Total any automatic debits you have scheduled for the next 10 business days including bank service charges \$ \_\_\_\_\_

5. Add Step 1 and Step 2, then subtract Step 3. This is your current available balance. \$ \_\_\_\_\_

6. Subtract Step 4 (scheduled debits for the next 10 business days, including any minimum balance you wish to maintain). This is the excess available to transfer to your new account. \$ \_\_\_\_\_

## Companies to notify of change

Use this worksheet to help you identify the companies you need to notify about changing automatic transactions linked to your account. This document is for your records only.

***For your protection, do not email personal information such as social security or account numbers.***

### AUTOMATIC DEPOSITS

### COMPANY/ADDRESS/OTHER ACCOUNT INFORMATION

Payroll

---

Government deposit

---

Transfers from other banks

---

Other

---

### AUTOMATIC DEBITS

### COMPANY/ADDRESS/OTHER ACCOUNT INFORMATION

Mortgage/Rent

---

Insurance

---

Loan payments

---

Gas

---

Electric

---

Water/Sewer

---

Internet

---

Streaming services/Cable

---

Telephone

---

Subscriptions

---

PayPal/Venmo/CashApp

---

Transfers to other banks

---

Other

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# Automatic payment/withdrawal change notice

Use this form to help you change your automatic payments.  
*For your protection, do not email personal information such as social security or account numbers. Some companies may require additional forms or verification before updating automatic payments.*

Name \_\_\_\_\_ Date \_\_\_\_\_

Account or identification number \_\_\_\_\_

Name of company/agent \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

## PREVIOUS FINANCIAL INSTITUTION

Name of institution \_\_\_\_\_

Account number \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

## COMPANY/BILLER NOTIFICATION OF NEW FINANCIAL INSTITUTION



Phone: (601) 264-1467  
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**Routing Number: 265371066**

I HEREBY AUTHORIZE YOU TO RE-DIRECT FUTURE AUTOMATED PAYMENT WITHDRAWALS TO MY NEW  CHECKING OR  SAVINGS ACCOUNT EFFECTIVE \_\_\_\_/\_\_\_\_/\_\_\_\_.

Name \_\_\_\_\_

Checking or  Savings account number \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Please store and dispose of completed forms securely.*

# DIRECT DEPOSIT CHANGE FORM

Give this form to your employer to change your direct deposit. *For your protection, do not email personal information such as social security or account numbers. Your employer's payroll system may require this information. Some employers or agencies may require their own forms or additional verification before updating direct deposits. Changing direct deposit commonly takes 1-2 weeks.*

Name \_\_\_\_\_ Date \_\_\_\_\_

Last four (4) digits of SSN \_\_\_\_\_

Name of company/agent \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

## PREVIOUS FINANCIAL INSTITUTION

Name of institution \_\_\_\_\_

Account number \_\_\_\_\_

Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

## NOTICE TO EMPLOYER OF NEW FINANCIAL INSTITUTION FOR DIRECT DEPOSIT



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Routing Number: 265371066

I HEREBY AUTHORIZE YOU TO RE-DIRECT FUTURE AUTOMATED DIRECT DEPOSITS TO MY NEW

CHECKING OR  SAVINGS ACCOUNT EFFECTIVE \_\_\_\_/\_\_\_\_/\_\_\_\_.

Name \_\_\_\_\_

Checking or  Savings account number \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Please store and dispose of completed forms securely.*