

COLLINSVILLE BUILDING & LOAN ASSOC.



Dear Customer,

We want to thank you for giving us the opportunity to serve your financial needs. Enclosed you will find our switch kit to help transition to your new account with Collinsville Building & Loan.

If you have any questions regarding the products chosen or if you need further assistance, please contact us at (618) 344-3172 or email us at depositservices@collinsvillebuildingandloan.com

We appreciate your business!

Sincerely,

Deposit Services, Collinsville Building & Loan

SWITCH KIT GUIDE



Follow these steps to make switching your accounts to CB&L easy!

Step 1: Open your CB&L account(s)

- Visit the CB&L location closest to you or open your account online
- Enroll in online banking and download the CB&L mobile app to stay on top of the switching process

Step 2: Discontinue using your previous account

- Leave sufficient funds in your previous account to cover outstanding checks or automatic payments

Step 3: Change your direct deposits to your new CB&L account

- Use the checklist and the direct deposit form to help you change your direct deposits to your new CB&L account
- Social Security Benefits can be changed by visiting [socialsecurity.gov](https://www.socialsecurity.gov) or by calling the Social Security Administration at (800) 772-1213

Step 4: Change your automatic payments

- Use the checklist and Automatic Payment Change request form to help you switch your automatic payments to your new CB&L account
- Don't forget, payments processed through a debit card will also need to be switched
- Follow-up with each service provider at minimum two weeks after sending them the form to confirm receipt

Step 5: Close your previous account

- Verify your automatic payments and direct deposit have successfully switched to your CB&L account.
- Verify all pending payments (checks and debit card transactions) have cleared your account
- Use the Account Closure Authorization form to close your account

AUTOMATIC DEPOSIT CHECKLIST



Deposits	Company Name	Account Number	Amount	✓
Payroll				
Payroll				
Retirement Income				
Social Security				
Investment Income				
Investment Income				
Other				
Other				

DIRECT DEPOSIT AUTHORIZATION



Company Information

Company Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____ Phone #: _____

Customer Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____ Phone #: _____

Bank Information

Financial Institution: Collinsville Building & Loan Association

Routing Number: 281070901

Please contact the Accounting department at (618) 344-3172 for direct deposit related questions.

Customer Account Information

Account Number: _____ ☐ Checking/MMDA ☐ Savings

Amount \$ or % (for full NET, write "100%"): _____

Account Number: _____ ☐ Checking/MMDA ☐ Savings

Amount \$ or % (for full NET, write "100%"): _____

Customer Authorization

Effective immediately, I authorize the Company listed above to electronically deposit my funds into the CB&L account(s) indicated in the amounts stated above. This authorization will remain in effect until I send written notice of change or cancellation. I acknowledge ACH transactions from my account must comply with US regulations.

Customer Signature

Date

701 Belt Line Rd
Collinsville, IL 62234

(618) 344-3172 (618) 667-6767
collinsvillebuildingandloan.com

100 W Market St
Troy, IL 62294



AUTOMATIC WITHDRAWAL CHECKLIST



Automatic Payments	Company Name	Account Number	Amount	✓
Mortgage/Rent				
Homeowner's/Renter's Insurance				
Car Loan				
Car Insurance				
Cell Phone				
Electricity/Gas				
Water/Sewer				
Trash				
Cable/Internet				
Streaming Services				
Gym Membership				
Credit Cards				
Investments/Retirement				
Other				

ACCOUNT CLOSURE AUTHORIZATION



Former Bank Information

Name: _____

Address: _____

City: _____ State: _____ Zip Code: _____

Customer Information

Account Owner(s) Name(s): _____

Address: _____

City: _____ State: _____ Zip Code: _____

Accounts to Close:

☐ Checking ☐ Savings ☐ Other Account Number: _____

☐ Checking ☐ Savings ☐ Other Account Number: _____

☐ Checking ☐ Savings ☐ Other Account Number: _____

I hereby authorize the above listed account(s) be closed. Please mail any remaining funds in these accounts to:

☐ Me, at the above listed address

☐ Collinsville Building & Loan Association

Attn: Deposit Services

701 Belt Line Road

Collinsville, IL 62234

CB&L account number(s) to be credited: _____

Customer Signature

Date

ONLINE BANKING CHEAT SHEET



Follow these steps to enroll in online banking.

1. Go to www.collinsvillebuildingandloan.com and select the Online Banking tab
2. Select "Setup your info" under the New Online Banking User section
3. Select "Let's Get Started"
4. Once the Online Banking Agreement & Disclosure has been read, check "I Agree" and select "Next"
5. Choose the second option "I know my Social Security Number"
6. Enter your Social Security Number (no dashes) and the CAPTCHA code. Select "Next"
7. Enter the following information:
 - Last Name
 - Social Security Number (no dashes)
 - Zip Code
 - Date of Birth (MM-DD-YYYY)
 - Any Account Number (twelve digits for deposit accounts; nine digits for loan accounts)
8. Choose three (or create your own) security questions. Enter the corresponding answers and select "Next"
9. Create your User ID and enter your Password. Select "Next"
 - Password must be 8-16 characters long, one upper and one lower case letter and one number
10. Congratulations! You are now enrolled in online banking. Download our mobile app from your devices' play store to access your accounts anywhere you go using the same credentials.