

# 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](mailto: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 a 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

**IMPORTANT:** Safeguard all personal and sensitive account information contained in the Switch Kit

\*Message and data rates may apply

701 Belt Line Rd  
Collinsville, IL 62234

(618) 344-3172 (618) 667-6767  
[collinsvillebuildingandloan.com](https://www.collinsvillebuildingandloan.com)

100 W Market St  
Troy, IL 62294



# 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

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# 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				

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# 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

Note: Please check with your previous financial institution for any additional closing requirements

# ONLINE BANKING CHEAT SHEET



Follow these steps to enroll in online banking.

1. Go to [www.collinsvillebuildingandloan.com](http://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 and 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 and 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.

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