

## **WillPenn Switch Kit**

Welcome! We know you will find the benefits of being a William Penn Bank customer worth the switch. To help you, we've put together this guide for your reference. We look forward to serving you as our customer.

***Open a New Checking Account at William Penn Bank.*** Stop by any of our convenient branch locations and open a new checking account at William Penn Bank. ***Do not close your old checking account. For a short period of time, both your old account and new account will be active.***

***Direct Deposits.*** Once your new account is open, you will need to change all of your **direct deposits** to your new William Penn Bank checking account. Common types of direct deposits include: **payroll check, retirement or pension payments, Social Security or other federal benefits, and investment and/or interest income.**

- The **Direct Deposit Form** provided contains the important information you need to notify your employer, Social Security, or any other organization of the change.

***Automatic Payments.*** If you have any payments, withdrawals or transfers that are automatically deducted from your old account, contact each of those companies and give them your new banking information. Common types of **automatic payments** include **loan payments, utilities, insurance or health club memberships.**

- Use the **Automatic Payments Worksheet** provided to keep track of those companies you've contacted. *This process may take several weeks, so plan accordingly. Keep enough money in your old account to cover all automatic payments, withdrawals and transfers.*

***Reminder:*** *If you've authorized a particular vendor or service provider to automatically charge monthly payments to your debit card, you'll need to give them your new debit card information to prevent an overdraft or late payment.*

***Sign-up for FREE Online Banking and FREE bill pay.*** Go to our secure website, [www.willpenn.com](http://www.willpenn.com), and sign up for William Penn's online banking by clicking the "First Time User" link and completing the required information. Once enrolled, you can use our free bill pay system to make payments from your checking account without writing a check. ***If you are currently using an online bill pay feature to handle automatic payments, remember to cancel those payments and set up to pay them through William Penn Bank's bill pay.***

***Close your old checking account.*** Closely monitor your previous checking account to make sure that all checks, debit card payments, ATM withdrawals, or other outstanding transactions have been posted before you close it. Once you are confident that all transactions have been accounted for, it's time to close the account. ***Carefully shred and securely dispose of all your old checks and debit/ATM cards after your account is closed.***

***Questions? Contact any of our Branch Managers for assistance.***

**Direct Deposit Form**

To change your direct deposit, you will need the following information:

**Bank:** William Penn Bank  
**Address:** 1309 S. Woodbourne Road  
Levittown, PA 19057

**Phone:** 215-269-1200

**Account Type:**  Checking  Savings  
**Account Number:** \_\_\_\_\_ (10 digits as it appears on your statement)

**William Penn Bank Routing Number:** 231372798

**Direct Deposit – Social Security Benefits**

To change your current Social Security direct deposit payment to an account at another financial institution:

**By phone:** Call the Social Security Administration office Monday through Friday:

**7:00 AM - 7:00 PM at 1-800-772-1213.**

**Online:** The Social Security Administration provides a secure website where you may change your direct deposit information.

***Reminder: Ask the Social Security office the date you can expect to receive your next benefit check directly deposited into your new checking account and make a note of this date.***

**Automatic Payments Worksheet**

Use this worksheet to list companies which have automatic payments, withdrawals or transfers from your account. Contact each company to change your automatic payments from your old checking account to your new checking account at William Penn Bank. *Here is the bank information you will need:*

**William Penn Bank**  
**1309 S. Woodbourne Rd.**  
**Levittown, PA 19057**  
**215-269-1200**

**Account Type:** \_\_\_ Checking \_\_\_ Savings  
**Account Number:** \_\_\_\_\_ (10 digits)  
*(as it appears on your statement)*

**William Penn Bank Routing Number: 231372798**

Automatic Payments/ Transfers	Company Name and Phone Number	Account Number	Amount	Payment Due Date	Set-up Complete	Notes
<b>Mortgage</b>						
Other Loan/Line						
Auto Loan/Lease						
<b>Utilities</b>						
Home Phone						
Cell Phone						
Cable / Internet						
Heating						
<b>Insurance</b>						
Home Insurance						
Life Insurance						
Car Insurance						
<b>OTHER</b>						
Health Club Membership						
Credit Cards						
Savings/Investments						