

ADVISOR BANK

Are you thinking of opening or have you recently opened a new checking account through Advisor Bank?

Switching banks has never been easier! Here's a checklist to assist you with the transition.

Automatic Payments Transfer Checklist

Type of Bill Pay

- Automotive
- Credit Cards
- Home (personal, doctors, etc.)
- Utilities

Payee's Information

- Account Numbers and Payees information
- Company Name
- Address, City, State, Zip

Recurring or Onetime Payment

- Open a hassle free Advisor Bank One Point Checking account by applying at www.advisorbank.com.
- Move your Direct Deposit(s) to Advisor Bank/ The Bancorp Bank, by completing the Direct Deposit form found [here](#) and providing it to your employer/ source of income. For Social Security direct deposit, please contact the Social Security Administration at 1-800-772-1213 or online at www.ssa.gov/deposit/howtosign.htm. Be sure to have your Advisor Bank new routing number and account number ready to provide to the representative.
- Stop using your old checking account.
- Cancel any automatic payments, transfers, and/or bill pays associated with your old checking account.
- Setup bill pay vendors for your new checking account by logging into your account and registering for Online Bill Pay. Simply click on the 'Make Payments' link located under the 'My Accounts' tab. If you need assistance, visit the FAQ page located in 'Help,' and click on 'Online Bill Pay Help' or contact our customer service team at 800.650.5904.
- Once you have allowed enough time for any outstanding checks to clear as well as automatic payments to be canceled, officially close your old checking account.