

### 1. How do I start the switch?

- ▶ Open your new account(s).
- ▶ Gather information about your current accounts.
- ▶ Use our SwitchKit Checklist to organize payments, deposits, and vendors.
- ▶ Notify your team, clients, and vendors of the change.

### 2. How long does it take to switch?

Most account transfers and setup of recurring payments take 1–2 weeks, depending on your current bank and the number of automated transactions.

### 3. Will I lose any banking history?

No. Your account history remains with your old bank. You may want to download statements for your records before closing your old account.

### 4. Can I keep my old account open during the transition?

Yes. We recommend keeping both accounts active for at least 1-2 billing cycles to ensure all payments and deposits transfer smoothly.

### 6. Who can I contact for help during the switch?

- ▶ Your dedicated business banker on the card below, or the branch manager at the banking center you opened your account at. See our Contact Us page.
- ▶ Our Contact Center can also be reached at 833.698.2265 for questions about forms or transfers.