



Account Closing/Transfer Request

Thank you for choosing Franklin Synergy Bank! You can use this form to close your checking and savings accounts at your old bank and transfer any remaining account balance(s) from your old bank to your new Franklin Synergy Bank account. Send or deliver this completed form to your old bank once all checks have cleared on your account(s). Make sure enough funds are available in your old account to cover any automatic payments that have yet to be withdrawn. For assistance, please contact us at Franklin Synergy Bank – (615) 236-BANK.

To: _____
 Bank Name

 Bank Address

 Bank City, State, Zip

From: _____
 Your Name

 Address

 City, State, Zip

 Telephone Number

RE: Account Closing Request

Please close the following accounts with your institution effective _____:

Account number: _____
 Checking Savings Money Market Other

Account number: _____
 Checking Savings Money Market Other

Account number: _____
 Checking Savings Money Market Other

Account number: _____
 Checking Savings Money Market Other

I/we authorize:

- The listed entity to close the accounts listed above
- Franklin Synergy Bank to credit entries to my account(s) as specified.
- The transfer of my funds to my Franklin Synergy Bank

Signature: _____
 Original Signature Required to Authorize Change

Social Security Number: _____

Signature: _____
 Joint Owner Signature

Social Security Number: _____

Please transfer any remaining funds in these accounts to the following address:

Franklin Synergy Bank
 3301 Aspen Grove Drive, Suite 106
 Franklin, TN 37067
 Transit/ABA # 064109329

Deposit instructions to Franklin Synergy Bank:

- Deposit entire amount to account number _____, or deposit as follows:
- \$ _____ to account number: _____ OR
- \$ _____ to account number: _____ OR
- \$ _____ to account number: _____



Switch Kit – Account Checklist

Welcome to Franklin Synergy Bank! Once you open your new Franklin Synergy Bank account(s), refer to this guide to make moving your accounts to our bank easy and convenient! We're always happy to help you. For assistance, please give us a call at (615) 236-BANK or stop by our office.

- For each account you would like to close and to transfer any remaining funds you will need:**
 - Old account number and a recent bank statement
 - New account number (checking, savings, IRA) provided by Franklin Synergy Bank
 - Franklin Synergy Bank routing number: 064109329
 - Account Closing/Transfer Request Form (provided by Franklin Synergy Bank)
 - Remember to make sure all checks have cleared your old account!

- To change your automatic payment or withdrawal, you will need:**
 - Recent statement from the vendor
 - New account number (checking, savings, IRA) provide by Franklin Synergy Bank
 - The Franklin Synergy Bank routing number: 064109329
 - Automatic Payment/Withdrawal Request Form (provided by Franklin Synergy Bank)

- To discuss transferring an existing loan, you will need:**
 - Recent loan statement with loan account number and balance remaining
 - Loan Transfer Worksheet (provided by Franklin Synergy Bank)

- To change your payroll or other direct deposit, you will need:**
 - Old account number and a recent bank statement
 - New account number (checking, savings, IRA) provide by Franklin Synergy Bank
 - The Franklin Synergy Bank routing number: 064109329
 - Payroll/Direct Deposit Transfer Request Form (provided by Franklin Synergy Bank)

- To change your Social Security Direct Deposit, you will need:**
 - New account number (checking, savings, IRA) provide by Franklin Synergy Bank
 - The Franklin Synergy Bank routing number: 064109329
 - Visit www.ssa.gov to change your deposit online or print out the government's Standard Form 1199A (also available from Franklin Synergy Bank)



Switch Kit – Loan Checklist

Use this worksheet to list all of your current loans. To complete the loan application process, please contact a Franklin Synergy Bank Loan Officer at (615) 236-BANK (2265).

1. _____
Name of Financial Institution

Type of Loan

Balance Remaining

Loan Account Number

From: _____

Name _____

Address _____

Address _____

City, State, Zip _____

Telephone Number _____

Social Security Number _____

2. _____

Name of Financial Institution

Type of Loan

Balance Remaining

Loan Account Number

3. _____

Name of Financial Institution

Type of Loan

Balance Remaining

Loan Account Number

*Subject to credit approval. This worksheet does not replace a Franklin Synergy Bank loan application. Please contact a Franklin Synergy Bank Loan Officer to apply for a loan.



Automatic Payment/ Withdrawal Transfer Request

Thank you for choosing Franklin Synergy Bank! Use this form to transfer an automatic withdrawal from your old bank account to your new Franklin Synergy Bank account. You will need to attach a voided check from your new Franklin Synergy Bank account.

Complete a form for each vendor who debits money from your account. You will need a separate form for each automatic withdrawal. For assistance, please contact us at Franklin Synergy Bank – (615) 236-BANK.

To: _____ Company Name Attn: Accounts Receivable/Accounting _____ Address _____ City, State, Zip	From: _____ Your Name _____ Address _____ City, State, Zip _____ Telephone Number
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Re: Change of Automatic Payment/Withdrawal

Please discontinue debiting account number _____ at _____

and change my automatic withdrawal to debit from my new Franklin Synergy Bank account. The Franklin Synergy Bank's routing information is below:

Franklin Synergy Bank
3301 Aspen Grove Drive, Suite 106
Franklin, TN 37067
Transit/ABA# 064109329

Please debit my account number _____ at Franklin Synergy Bank.

(A voided check is attached)

I/we authorize:

- The listed entity to initiate withdrawal of funds from my account at Franklin Synergy Bank
- Franklin Synergy Bank to debit entries to my account(s)

Signature: _____
Original Signature Required to Authorize Change

Print Name: _____

Date: _____