

Account Information



Individual Account

Full Name (first, middle, last)

Physical Address

City State Zip

Mailing Address (if different)

City State Zip

Home Phone Work Phone

Email Address

Primary account holder information

Social Security Number / Tax ID

Driver's License Number Expiration Date

Date of Birth

Customer Codeword (example: Mother's Maiden Name)

Employer

Occupation / Position

Signature

Joint Account

Full Name (first, middle, last)

Physical Address (if different from primary account holder)

City State Zip

Mailing Address (if different)

City State Zip

Home Phone Work Phone

Email Address

Joint account holder information

Social Security Number / Tax ID

Driver's License Number Expiration Date

Date of Birth

Customer Codeword (example: Mother's Maiden Name)

Employer

Occupation / Position

Signature

SWITCH KIT

We make it easy to switch banks.



Important Information

Some companies require the use of their own forms to initiate the switching of accounts. In order to help facilitate this change from your existing account to your new Legacy Bank account, we may ask you to provide your current banking information, including a previous bank statement and any forms supplied to you by your employer or party originating the debit or credit.

To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify and record information that identifies each person who opens an account. What this means for you: When you open an account, we will ask for your name, address, date of birth, and other information that allows us to identify you. We may also ask to see your driver's license or other identifying documents.

Account Preferences

Please indicate the accounts and services you currently use or are interested in:

- | | | |
|--|--|---|
| <input type="checkbox"/> Checking Account | <input type="checkbox"/> Savings Account | <input type="checkbox"/> Money Market Account |
| <input type="checkbox"/> Certificates of Deposit | <input type="checkbox"/> Investment Products | <input type="checkbox"/> Credit Card |
| <input type="checkbox"/> Internet Banking | <input type="checkbox"/> ATM/Check Card | <input type="checkbox"/> Refinance |
| <input type="checkbox"/> Home Loans | <input type="checkbox"/> Personal Loans | <input type="checkbox"/> Auto/Boat |

Switch Steps

1. Open an account with Legacy Bank
2. Stop using your old account
3. Choose the switch letters you need
4. Fill out and sign the letters
5. Hand the letters to us to mail

Switch Letters (choose all that apply)

- Close your current bank account(s)
- Switch your preauthorized automatic withdrawal(s)
- Switch your check card withdrawal information
- Cancel your automatic withdrawal(s)
- Authorize new automatic withdrawal(s)
- Set up new direct deposit(s)
- Switch your direct deposit(s)