

Zions Bank® Switch Kit

Thinking about switching Banks? We make it easy!

Here are a few reasons why Zions Bank is for you:

Zions Bank has been a leading community bank in Utah and Idaho since 1873. We're committed to provide the best service and products that fit your lifestyle. Whether that's doing it all digitally with Online and Mobile Banking or visiting with our friendly, knowledgeable employees at your local branch. We're here to make the switch quick and easy!

step 1 >>>> **Open your account at Zions Bank**

This is the most important step! To get started you can visit any of our 122 branch locations or start your new account Online with our quick and easy online application.

To open an account you will need:

- All applicants present
- Your Social Security number
- Two forms of valid ID such as a Drivers License, State ID, or Passport (Secondary forms include major credit or debit card, in state student id, in state employer id with picture)
- Contact information for everyone on the account
- A minimum of \$50.00 to fund the account

Additionally:

- Make sure to enroll in Digital Banking that gives you 24-hour access to your money using your Computer or Mobile Phone.
- And, don't forget to sign up for one of our AmaZing Credit Cards to get cash back, low rates and more.

step 2 >>>> **Transfer Direct Deposits and Automatic Payments**

Now it's time to get everything organized. This is important and we don't want you to miss anything so we've created this checklist to ensure your payments and deposits get transferred over with ease. (As you begin this process we recommend having a few recent bank statements to review.)

- First, you'll need to switch the direct deposits from your employer, retirement plan, or other sources of income such as Social Security. To print out a Direct Deposit form; login to Online Banking, visit the Services page and then click on Direct Deposit Request under the Account Services tab.
- Next, you'll need to contact companies that you've setup automated payments with such as your insurance company, gym or local utilities. Have your new account number on hand along with the Zions Bank routing number 124000054.

- If you're using Online Bill Payment, print out a list of your current Payees and your Payment History. Take a few minutes to add all your payees into Zions Bank Bill pay. This can be done in Online Banking or through the Mobile App. However, if you're adding a bunch your first time we recommend doing it through Online Banking. To get started follow these steps:

In Online Banking:

- Log in to Online Banking
- Click on the payments tab
- Select Bill Pay
- Then Add a Company or Person

We have a large network of payees so many of the companies you currently pay will already be on file with their addresses and phone numbers.

In the Zions Bank Mobile App:

- Log in to the Mobile App
- Select Bill Pay from the Quick Menu (+)
- Then Add a new payee (+)

step 3 >>>> **Close your old account**

Let's take a minute and make sure you're ready to take this step:

- Have you switched all your Direct Deposit & Automatic Payments?
- Have all your transactions (checks, debit card purchases, transfers, automatic payments, etc.) cleared your old account?
- Have you received your Zions Bank debit card and pin?
- Have you enrolled in Online Banking and Bill Pay?
- Have you download the Zions Bank Mobile App?

If the answer is yes to these questions, then it's time to take the final step and close out that old account! Simply contact your former Financial Institution and let them know you want to close out your account and follow their processes.

If you have additional questions please contact our Customer Care Center at 1-800-974-8800 (Monday- Saturday, 7 a.m. to 8 p.m. MT) or visit your local Zions Bank Branch.