

# MAKE THE SWITCH

*fast, easy & secure*

## EXPERIENCE MY BANK FOR YOURSELF.

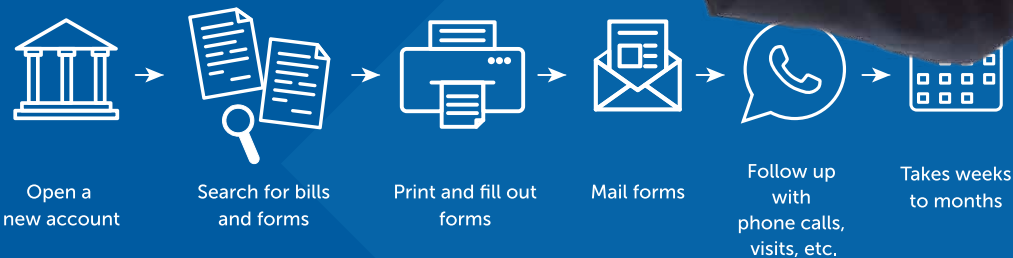
Switching to Heritage Bank is now Easy, Safe and DONE in minutes. So many of our customers tell us they would have moved to Heritage Bank sooner if they'd known how different banking could be and if switching wasn't such a hassle. With ClickSWITCH, the hassle is history.

### < ClickSWITCH >

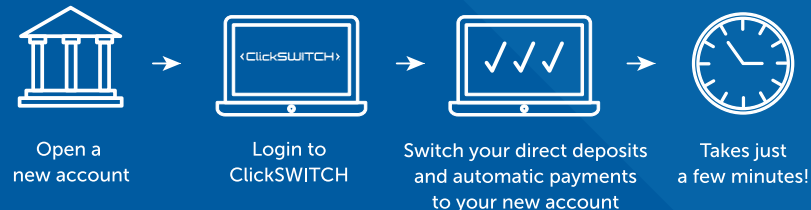
Quickly, easily and safely move direct deposits and recurring payments.



### Before ClickSWITCH



### After ClickSWITCH



*\*Setting up ClickSWITCH is generally very simple and fast. Occasionally, there are complications that require a little more time. However, switching is usually still faster and easier than the traditional method.*





## Get Started Today.

Visit a branch and a Heritage Banker will assist you with the following steps.

- Open a new Heritage Bank account.
- Work with a Heritage Banker to gather information and start the switch process.
- Use the switch track code your Heritage Banker provides, log into the ClickSWITCH portal to update any necessary missing information, including recurring payments and direct deposits to Heritage Bank. Please contact your Heritage Banker for assistance.

*IMPORTANT: Please leave your old account open for 30 days. Our switch service will automatically send an account closure notice and change of account form to your previous institution; however, it may take up to 30 days for all switches to be completed. We encourage you to contact your bank directly to ensure they will accept the account closure letter or if they require something additional from you.*

## Automated Payments Checklist

An automated payment (or ACH) is a regular, ongoing payment that is initiated from your bank account, such as a monthly insurance bill, utility payment or automobile loan payment. Use the checklist below to organize the transfer of your automatic payments to your new account. Take into consideration any annual payments that you may have set up as a deduction.

- |  |  |
|--|--|
| <input type="checkbox"/> Electric              | <input type="checkbox"/> Life/Health     |
| <input type="checkbox"/> Mortgage/Rent Payment | <input type="checkbox"/> Insurance       |
| <input type="checkbox"/> Gas                   | <input type="checkbox"/> Auto Club (AAA) |
| <input type="checkbox"/> Automobile Loan/Lease | <input type="checkbox"/> Charitable      |
| <input type="checkbox"/> Water Department      | <input type="checkbox"/> Donations       |
| <input type="checkbox"/> Store Card            | <input type="checkbox"/> Health Club     |
| <input type="checkbox"/> Telephone             | <input type="checkbox"/> Other Loans     |
| <input type="checkbox"/> Home/Rental Insurance | <input type="checkbox"/> Credit Card     |
| <input type="checkbox"/> Mobile Phone          | <input type="checkbox"/> Other           |
| <input type="checkbox"/> Automobile Insurance  |  |
| <input type="checkbox"/> Cable Service         |  |

## Direct Deposit Checklist

A direct deposit is any payment that you receive from a person or organization directly into your account. These include, but are not limited to, payroll direct deposits, government direct deposits (Social Security, Disability, etc.) and dividend direct deposits from investment accounts. Use the checklist below to organize the transfer direct deposits to your new account

- Employee Payroll
- Social Security
- Investment Income
- Retirement/Pension
- Other

Call Us: 859-493-4301

Visit Us: <https://www.ourheritage.bank/locations-hours.aspx>