

United Roosevelt Savings Bank

Switch to URSB Kit

Make banking with us more convenient by following these simple steps.

We can assist you in opening an account today at United Roosevelt Savings Bank. Come in and talk with a New Account Specialist. You will need 2 forms of Identification.

- 1** Complete a **New Account Form** from United Roosevelt Savings Bank today and we will help you choose the account that's best for you!
- 2** Fill out the **Direct Deposit** form for your employer or other provider so your direct deposits automatically go to your United Roosevelt account.
- 3** Sign off on the **Automatic Payment Change** form and present it to the parties that you have arranged automatic payments with.
- 4** Complete the **Account Closure** form for presentation to your current bank. This will advise them that you are closing your account and authorizing the transfer to United Roosevelt Savings.



UNITED ROOSEVELT
SAVINGS BANK

Your Hometown Bank for Over 100 Years.

732-541-5445

www.ursbank.com

New Account Form

Completely fill out a form for each account holder and bring it to United Roosevelt Savings Bank. Please have 2 forms of identification with you.

I'd like to open Personal Checking Statement Savings
 Certificate of Deposit IRA Other

Customer's Name: _____

Social Security # or TIN: _____

Address: _____

City/State/Zip _____

Note: Account holder must be New Jersey resident.

Phone # Home: _____

Cell: _____

Date of Birth: _____

Mother's Maiden Name: _____

Driver's License #: _____

Issue Date: _____ **Exp Date:** _____

Employer: _____

Occupation: _____

(If retired, please list former occupation)

How did you hear about United Roosevelt Savings Bank?

Attach a photocopy of customer's primary identification card with this form (i.e Primary forms of ID – NOT EXPIRED Driver's License, Passport, Medicare/Medicaid, Military ID, Green Card. Secondary forms of ID – Birth Certificate, Utility or Tax bill, Vehicle Registration Card, Major Credit Card, Voting Registration card.)



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Direct Deposit Form

Give this completed Direct Deposit form to your employer to request the direct deposit of your check to your new United Roosevelt Savings account.

Name: _____

Address: _____

City/State/Zip: _____

Please have my payroll check automatically deposited into the following account:

Account #: _____

Bank: United Roosevelt Savings Bank - ABA/Routing # 221270240

Account Type: Personal Checking Statement Savings

I authorize _____ and United Roosevelt Savings Bank to automatically deposit my check into my account listed above. This authorization will remain in effect until I give written notice to cancel it.

Customer Signature

Date

ATTACH VOIDED CHECK (if required by your company)



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Automatic Payment Change Form

Use this form to change your automated payments. Complete this form for all parties that you have arranged payments with.

Name: _____

Address: _____

City/State/Zip: _____

Account #: _____

To Whom It May Concern:

Effective immediately, I authorize and direct _____ to redirect automatics payments for the above account number to my new bank account as instructed below.

New Account #: _____

Bank: United Roosevelt Savings Bank - ABA/Routing # 221270240

Account Type: Personal Checking Statement Savings

Customer Signature

Date

Social Security #

ATTACH VOIDED CHECK (if required by your company)



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Account Closure Request Form

Use this form to notify your previous Bank regarding the accounts you will be closing once all funds and transactions have been disbursed.

Name: _____

Address: _____

City/State/Zip: _____

To Whom It May Concern:

Please close the following account with your institution:

Name on Account	Account #	Type
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Name on Account	Account #	Type
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Please send a check for the remaining balances plus any interest accrued if applicable to:

Primary Account Holder Signature

Date



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