



# Transitioning Your Banking Relationship

We understand that switching banks is a daunting task. It's our job to make it easier.

When you're ready, we'll meet with you to better understand your business' needs, financial goals and banking preferences. Then, we'll create a customized transition plan so you know exactly what to expect.

Our goal is to ensure the process is as easy and seamless as possible so you can spend more time on what matters most—your business.

## **Dedicated Relationship Banking Team**

You'll have a dedicated commercial lending and relationship banking team working for you whose expertise can meet your lending, cash management and investment needs. Our years of commercial banking experience allows us to anticipate your evolving needs so we can recommend services and guide you through each step of the process.

## **Simplified Electronic Documentation**

Account disclosures and agreements can be signed electronically at your convenience.

## **Automatic Payments**

We'll ensure all of your existing payments (whether incoming or outgoing) are taken care of.

We'll review three to six months of bank statements to identify vendors initiating payments to and from your accounts. Once identified, we'll gather business names, contact information, mailing/email addresses, etc. from your accounting department.

Then, we'll generate letters with your new bank account information that you can share with your vendors. We're happy to help coordinate sending the letters; however, your vendors may expect or require this information come directly from you.

For all other transactions (such as wire transfers, ACH, templates, etc.), we will work with you to ensure there is no interruption to your business.

We recommend maintaining your previous bank account for a minimum of 30 days while onboarding is completed.

**Ready to get started? Contact us today.**