

Welcome to Ascend Bank

We understand that when it comes to switching banks, it can be hard to know where to start. That's why we've developed the Easy Switch Kit - a step-by-step checklist to help make your transition to Ascend Bank quick and easy.

To get started, just follow the simple steps to the right and use the accompanying forms. We've included some important information below for your convenience.

Additional Online Services

After you've registered for Online Banking, it's time to explore the great financial tools we offer!

We offer free Online Statements, which help save paper and time! If you're the type that's always on the go, we have free mobile and text message banking, as well as helpful balance alerts and reminders*.

Also included is FinanceWorks, which allows you to see your full financial picture, including accounts not held by Ascend Bank. You can also control your spending, set budgets and categorize your purchases.

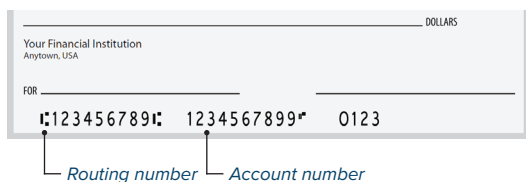
*Message & Data rates may apply from your wireless carrier. Not all wireless carriers supported.

Routing & Account Numbers

During the switch process, you may need to find your former financial institution's routing number or your account number.

A bank's routing number is the 9-digit number located in the bottom left corner of your check.

Your account number is the set of numbers appearing just after the routing number.



Contacting Us

We're here to help you with anything you need throughout the transition.



Customer Care: (203) 453-2721
Mon-Fri 8am - 5pm, Sat 8:30am - 1pm



Additional Forms & Switch Info
Ascend.bank/EasySwitch



Mailing Address:
P.O. Box 369, Guilford, CT 06437

How to Make the Switch:

After you've opened your new Ascend Bank accounts, it's time to make sure everything switches to where it should be.

1) Sign Up for Online Banking

Simply visit www.Ascend.bank and click on "Register" near the login at the top right. Once you've registered, you can view your accounts, transfer funds, pay bills and sign up for online statements. Frequent monitoring of your accounts via online banking will help you track your direct deposits, automatic withdrawals and bill payments or checks as they clear your new Ascend Bank account.

2) Stop Using Your Former Bank Account as Soon as Possible

Be sure to leave sufficient funds in your former account until all of your checks have cleared and any automatic withdrawals have been successfully transferred to Ascend Bank.

3) Change Your Direct Deposits to Ascend Bank

Make use of our Direct Deposit Change Authorization form to change any direct deposits. In addition to your payroll, this may include social security or interest payments.



The Direct Deposit Change Authorization is enclosed on Page 2.

4) Change Automatic Payments & Bill Pay to Ascend Bank

Use our Automatic Payment Change Authorization form to switch any withdrawal that comes out automatically & track other electronic transactions. For your convenience, we have also enclosed an Automatic Transaction Checklist. You may use this to help you move over information from your former bank's Bill Pay. To begin entering the information in Ascend Bank's Bill Pay after you've registered for Online Banking, simply log-in and click on "Payment Manager."



The Automatic Payment Change Authorization is enclosed on Page 3.



The Automatic Transaction Checklist is enclosed on Page 4.

5) Close Your Account(s) at Your Former Institution

Submit our Authorization to Close form to your former institution. You have the option to choose how you would like your remaining funds disbursed. Don't forget to shred your old debit card and leftover checks for security purposes.



The Request to Close Account form is enclosed on Page 5.

If we can be of any assistance throughout the transition, please contact us.

Direct Deposit Change Authorization

Complete this form to change your direct deposit to Ascend Bank.

Date: _____

To (Company): _____

Address: _____

City, State, Zip: _____

Dear (Company) _____:

I have recently changed banks and will need to have my direct deposit switched from my old account to my new Ascend Bank account. Below you will find any personal information you may need to aid in this process.

I currently have my direct deposit going to

Financial Institution Name: _____

Account Number: _____ Routing Number: _____

Please change my direct deposit to my new Ascend Bank account as soon as possible.

Primary Account Holder Name: _____

Ascend Bank Address: One Park Street P.O. Box 369 Guilford CT 06137

Account 1

Account 2

Account Number: _____

Account Number: _____

Type of Account: Checking Savings

Type of Account: Checking Savings

Routing Number: _____

Routing Number: _____

Please deposit the entire amount into Account 1.

Please deposit _____ into Account 1 and the remaining amount into Account 2.

I have attached a voided check from my new Ascend Bank account (if available). If you should have any questions regarding this change, please call me on my daytime phone number:

Sincerely,

Customer Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Automatic Payment Change Authorization

Complete this form and submit it to any company or organization that automatically withdraws payments from you, existing account.
Please complete a form for each payment involved, and remember that a change can take a few weeks to process.

Date: _____

To (Company): _____

Address: _____

City, State, Zip: _____

Dear (Company) _____:

I have recently changed banks and will need to have my automatic payments switched from my old account to my new Ascend Bank account. Below you will find any personal information you may need to aid in this process.

I currently have my automatic payments withdrawn from:

Financial Institution Name: _____

Account Number: _____

Routing Number: _____

Please change my automatic payment to my new Ascend Bank account as soon as possible.

Account Holder Name with Your Organization: _____

Account Number with Your Organization: _____

Type of Payment (Mortgage, Car Insurance, etc.): _____

Ascend Bank Account Information:

Account Number: _____

Routing Number: _____

Type of Account: Checking Savings

Ascend Bank Address: One Park Street, P.O. Box 369, Guilford, CT, 06137

I have attached a voided check from my new Ascend Bank account (if available). Please send me written confirmation of when this will be effective. If you should have any questions regarding this change, please call me on my daytime phone number:

Sincerely,

Customer Signature: _____

Name: _____

Address: _____

City, State, Zip: _____

Automatic Transaction Checklist

Use this form to gather all of your payment and deposit information in one place for easy reference and tracking.

Automatic Withdrawals and Bill Payments

Payment	Company	Mailing Address & Phone Number	Account Number	Amount	Date of Payment	Switched to Ascend Bank
Mortgage/Rent						
Auto Loan #1						
Auto Loan #2						
Car Insurance						
Home Insurance						
Credit Card #1						
Credit Card #2						
Credit Card #3						
Credit Card #4						
Gas/Oil						
Electric						
Television						
Cell Phone #1						
Cell Phone #2						
Internet						
Water						
Trash Removal						
Health Club						
Education						
IRA/Retirement						
Other						

Direct Deposits

Payment	Company	Mailing Address & Phone Number	Account Number	Amount	Date of Payment	Switched to Ascend Bank
Payroll #1						
Payroll #2						
Retirement #1						
Retirement #2						
Social Security #1						
Social Security #1						
Investments						
Other						

Request to Close Account

Complete this form to close out your accounts at another financial institution and request a check for the remaining balance.

Date: _____

To (Financial Institution): _____

Address: _____

City, State, Zip: _____

Dear (Financial Institution] _____:

I have recently changed banks and need to close the following accounts with your institution. Below you will find any personal information you may need to aid in this process.

Primary Account Holder Name: _____

Secondary Account Holder Name: _____

Address: _____

City, State, Zip: _____

Please close the accounts listed below as soon as possible.

	Checking	Savings	Money Market	Other
Account Number: _____				
Account Number: _____				
Account Number: _____				
Account Number: _____				

Please send a check in the amount of my account balance plus any accrued interest to my attention at the address on file. If you have any questions regarding this change, please call me on my daytime phone number:

Sincerely,

Primary Account Holder Signature: _____

Name: _____

Secondary Account Holder Signature: _____

Name: _____