

## No Sweat Switching Questions and Answers

- Q. Is there a better time during the month to actually make the switch to a new bank?**
- A.** No. In today's world of mixed billing and payment methods, it usually does not make a difference.
- Q. You offer different options for making the switch. Which is the best?**
- A.** It totally depends on your habits and preferences. They vary from person to person and that's why we offer the options. You decide what will work best for you!
- Q. If I want a CSR to help me with the entire switch, what can I expect?**
- A.** The CSR will need for you to bring certain information with you when you come in to complete the switch forms. A list is available if you need it (see link to contact information). Using this information, the CSR will help you make any necessary calculations and then fill out the appropriate forms for you. She will then give them to you to check. They will then be ready for mailing!
- Q. How long will this take?**
- A.** That depends on the complexity of your situation and the number of accounts involved. In general, it should take no more than 30 minutes.
- Q. What if I want the Customer Service Representative (CSR) to do some of the paperwork but do some of it myself?**
- A.** That's perfectly OK. Each of the switch forms is an independent piece. They were purposely designed that way so that you would have this kind of flexibility.
- Q. Is there a HELP line I can call if I am working on the forms and have questions?**
- A.** If you have questions or need help, do not hesitate to call. The best person to talk with is the CSR at the branch where you will have your account.

