



H&R BLOCK BANK SWITCH KIT CHECKLIST

Everything you need to switch your account can find right here.

Print out the paperwork and provide it to the appropriate party.

Open your H&R Block Bank account

Stop by an H&R Block Bank office or visit our website www.hrblockbank.com to open your account.

Stop using your old account

Allow all your checks and debits to clear. This could take up to 10 days. Remember how slow they were? To pass the time, destroy any unused checks, debit cards and deposit slips. No shredder at home? Bring them to us and we'll shred them for you.

Change direct deposits

Complete the enclosed Direct Deposit Change Request and give it to your employer. If you have direct deposit of Social Security or another government direct deposit, please use the [Standard Form 1199A](#).

Direct deposit Authorization

Complete the enclosed Direct Deposit Request and give it to your employer.

Change automatic payments and deposits

Complete the enclosed Automatic Payment/Deposit Change Request. Don't forget about payments that use your old debit card number, such as an internet service provider or health club.

Close your old account

Here's the day you've been waiting for! Mail or fax in the enclosed Close Account request to close your old account. No face-to-face confrontation necessary.

Transfer a 401K or IRA

Call us at 1-888-687-4722 to find out how we can help you transfer your 401K or IRA to an H&R Block Bank administered IRA.

Mail or Fax paperwork to HRBB

Mailing Address:

H&R Block Bank
PO Box 10364
Kansas City, MO 64171-0364

Fax Number:

(816)854-8050



DIRECT DEPOSIT CHANGE REQUEST

Complete this form for each company with whom you have direct deposit.

Please Note: If you have social security or other government benefits direct deposit, please use the Treasury Department, [Standard Form 1199A](#). You can also call Social Security at (800)772-1213 to make social security direct deposit arrangements.

Company Name: _____ Date: _____

Address: _____

City: _____ ST: _____ ZIP: _____

This form serves as my request to have my direct deposit transferred to my new account at H&R Block Bank:

Old Bank: _____

Name on Account: _____

Account Number: _____

Routing Number: _____

Please redirect the deposit into my new account with:

New Bank Name: **H&R Block Bank**

Address: **PO Box 10364, Kansas City, MO 64171**

Telephone Number: **(877) 831-2189**

Account Number: _____

Routing Number: **101089700**

Signature: _____

Name (Please Print) _____

Address: _____

City: _____ ST: _____ ZIP: _____

Telephone: _____



DIRECT DEPOSIT REQUEST

Use this form to instruct the payer company to initiate direct deposit to your H&R Block Bank account.

***Please Note:** If you have social security or other government direct deposit, please use the Treasury Department, [Standard Form 1199A](#). You can also call Social Security at (800)772-1213 to make social security direct deposit arrangements.*

Company Name: _____ Date: _____

Address: _____

City: _____ ST: _____ ZIP: _____

Please direct the deposit into my new account with:

New Bank Name: **H&R Block Bank** _____

Address: **PO Box 10364, Kansas City, MO 64171** _____

Telephone Number: **(877) 831-2189** _____

Account Number: _____

Routing Number: **101089700** _____

Signature: _____

Name (Please Print) _____

Address: _____

City: _____ ST: _____ ZIP: _____

Telephone: _____



H&R BLOCK
bank

AUTOMATIC DEPOSIT/PAYMENT CHANGE REQUEST

Complete and sign one copy of this form for each automatic payment or deposit (other than payroll) and mail to the company that deposits or debits from your old account.

Company Name: _____ Date: _____

Address: _____

City: _____ ST: _____ ZIP: _____

This form serves as my request to have my automatic deposit/payment transferred to my new account at H&R Block Bank.

Automatic Deposit

Automatic Payment

Old Bank: _____

Name on Account: _____

Account Number: _____

Routing Number: _____

Amount: \$ _____

Please redirect the deposit into my new account with:

New Bank Name: **H&R Block Bank**

Address: **PO Box 10364, Kansas City, MO 64171**

Telephone Number: **(877) 831-2189**

Account Number: _____

Routing Number: **101089700**

Signature: _____

Name (Please Print) _____

Address: _____

City: _____ ST: _____ ZIP: _____

Telephone: _____



CLOSE ACCOUNT REQUEST

Complete this form and return it to your old bank.

Bank Name: _____ Date: _____

Address: _____

City: _____ ST: _____ ZIP: _____

This form serves as my request to close the following account:

Name on Account: _____

Account Number: _____

Account Type: _____

Please send a bank check for the remaining balance to the following address:

Payable to: **H&R Block Bank FBO** _____

Address: **Attention: Bank, PO Box 10364, Kansas City, MO 64171** _____

Telephone Number: **(877) 831-2189** _____

Account Number: _____

If you have any questions about this request, please contact me during the **DAY / EVENING** (circle one)
at (_____) - _____ (Telephone number).

Owner Signature: _____

Name (Please Print) _____

Co-owner Signature: _____

Name (Please Print) _____

Address: _____

City: _____ ST: _____ ZIP: _____

Telephone: _____