

Say goodbye to your other bank.

BankSA Easy Switch™



Switch your banking to BankSA.

WELCOME.

The BankSA Easy SwitchTM pack takes the hassle out of switching banks.

You've got your reasons to change, now there's no reason not to.

ONLINE EASY SWITCH.

BankSA Easy Switch is also available online, as an alternative to completing this document. We've prepared everything for you – simply go to www.banksa.com.au/easyswitch complete your details, sign and send.

YOUR BANKSA ACCOUNT DETAILS.

BSB Number	Account Number
BSB Number	Account Number
BSB Number	Account Number
Branch	

AT A GLANCE: SWITCH TO BANKSA IN FIVE EASY STEPS.

Stop using the bank account you wish to close.

Arrange to have your salary paid into your BankSA account.

Transfer Direct Credits and Debits.

Transfer periodical payments.

Close your other account.

Switch your banking in five easy steps.

BEFORE YOU START - OPEN A NEW BANKSA BANK ACCOUNT.

Before you start the process of switching to BankSA, you will need to have an account open. If you haven't already done this, visit a BankSA branch near you or call **13 13 76**. Registering for BankSA Phone and Internet Banking will also allow you to monitor and manage your account.

1

Stop using the bank account you wish to close - and start planning.

Don't forget to leave sufficient funds to cover any outstanding cheques or automatic payments that may be charged to your other account.

Spend some time planning by working through previous account statements, identifying regular payments to and from your account - completing the *Current Account Activity Summary* as you go. Keep in mind that payment cycles can range from weekly, fortnightly, monthly, quarterly, half yearly or yearly.

2

Arrange to have your salary paid into your BankSA account.

Complete the *Salary Transfer Request* form and send it to your employer/payroll department to have your salary paid into your account.

3

Transfer direct credits and debits.

Where an organisation pays money directly into your account, such as dividends, government benefits or a pension, you'll need to transfer them.

Complete a *Direct Credit Transfer Request* form for each direct credit that you have identified, and send it to the relevant organisation.

If you pay a company by direct debit, complete a *Direct Debit Transfer Request* form for each direct debit that you have identified, and send it to the relevant company/person.

4

Transfer periodical payments.

Make sure you cancel and transfer any automatic regular payments (perhaps you make loan and credit card payments to another bank) from your other account to your BankSA account. At BankSA, we can help you set up these payments.

5

Close your other account.

When you are certain that your salary and various credits, debits and regular payments have been transferred to your BankSA account, it's time to close your other account(s). A separate *Account Closure Request* form is required for each account that you wish to close.

Current Account Activity Summary.

Direct Credits

Company/Person Crediting account	Reference	Frequency	Amount Credited	Payment Date	Instructions sent	Completed 🗸
Eg: Dowling Real-estate	12 34 56 7	Fortnightly	\$800.00	Every Second Thursday		

Direct Debits

Company/Person Crediting account	Reference	Frequency	Amount Credited	Payment Date	Instructions sent	Completed <
Eg: Telstra	952 55515	Monthly	Varies	25th of each month		

Have you considered . . .

Direct Debits

- ✔ Home Loan repayments
- ✔ Home/Mobile Phone
- ✔ Personal Loan repayments
- ✔ Electricity account
- Childcare payments
- ✓ Magazine subscriptions
- ✓ Health fund
- ✓ Gas account
- ✔ Home/Contents Insurance

✔ Rent payments

- ✓ School/University fees
- ✔ Finance repayments
- ✔ Donations
- ✓ Car-parking fees
- ✓ Gym memberships
- ✓ Credit Card payments
- ✔ Life, income protection Insurance✔ Internet Account

Direct Credits

- ✓ Government entitlement/benefits
- ✓ Share Dividend payments
- ✓ Investment Property rent
- ✔ Health fund



Name of Employer							
Name of Employee							
Employee's Addres	is						
To the Payroll Mana	ager,						
From	(date) I,						(name),
			D 104				sition number
wish to have my sa	lary paid directly	into my	BankSA	accoun	t as follo	ows:	
New Account Deta BankSA	ils						
BSB No. 1	0 5 -						
Account Name							
	Total Salary						
	Selected Amou	unt →	\$				
Sincerely,							
X							
Date							
	/ /	/					
dd	mm	уу					

Once complete, please forward to your payroll department/officer



Name of Comp	any/Person Cred	liting Account			
Address					
				Postcode	е
Memhershin No	o./Account No./R	eference No. /	Customer No		
Wernbership 14	5.7 Noodant 140.7 N		oustomer No.		
Dear Sir/Mada	m,				
I am writing to	inform you that I	have changed	the bank accor	unt from which	I would like my
		payment credit	ed.		
Please ensure	that all payments	due after	/ /	are made	to the
following accou			dd mm	уу	
New Account I BankSA	Details				
BSB No.	1 0 5 -				
Account No.					
Account Holder	Name(s)/Name	as it appears (on card		
If you have any	queries, please	call me Teleni	hone Number:		
Yours faithfully,		can me. relepi	ione Number.		
•	r Signature(s) (a	II interested pa	arties to sign)		
X			X		
Date			Date		
	/	/		/	/
dd	mm	VV	dd	mm	W



Name of Compa	any/Person Cred	liting Account			
Address					
				Postcod	e
Membership No	./Account No./F	Reference No./Co	ustomer No.		
	<u>, , , , , , , , , , , , , , , , , , , </u>	·			
Dear Sir/Madan	n,				
I am writing to i	nform you that I	have changed th	ne bank accou	nt from which	I would like my
		payment credited	d.		
Please ensure t	hat all payments	due after dd	/ /	are made	e to the
New Account D BankSA	etails				
BSB No.	1 0 5 -				
Account No.					
Account Holder	Name(s)/Name	as it appears or	card		
If you have any	queries, please	call me. Telepho	ne Number:		
Yours faithfully,			L		
Account Holder	Signature(s) (a	ll interested par	ties to sign)		
X			X		
Date			Date		
Date	/	/		/	/
dd	mm	W	dd	mm	W



Name of Company/Person Debiting Acco	unt
Address	
	Postcode
Mambarshin No. /Account No. /Poforance	No (Customar No
Membership No./Account No./Reference	No./ Customer No.
Dear Sir/Madam, I am writing to inform you that I have chardirect debit withdrawn.	nged the bank account from which I would like my
Please ensure all amounts from dd account below:	are deducted from the
New Account Details BankSA	
BSB No. Account No. Credit Card	Exp /
Account Holder Name(s)/Name as it appe	ears on card
If you have any queries, please call me. T Yours faithfully, Account Holder Signature(s) (all interest	
X	X
Date	Date
/ /	/ /
dd mm w	dd mm w

Direct Debit Transfer Request



BankSA – A Division of Westpac Banking Corporation ABN 33 007 457 141 AFSL 233714

Name of Company	/Person Deb	iting Account			
Address					
				Posto	code
Membership No./A	account No./F	Reference No.,	Customer	No.	
Dear Sir/Madam, I am writing to info direct debit withdra	-	have changed	I the bank a	account from wh	ich I would like my
Please ensure all a account below:	amounts from	dd mm		are deducted fro	om the
New Account Deta BankSA	ails				
BSB No. Account No. Credit Card	0 5 -				Exp /
Account Holder Na	me(s)/Name	as it appears	on card		
If you have any quo Yours faithfully,	eries, please	call me. Telep	hone Numb	per:	
Account Holder Si	gnature(s) (a	ll interested p	arties to si	gn)	
Date			Date		
	/	/		/	/
hh	mm	W	d	d mm	W



Name of institution where your non-BankSA account is held
Address of institution where your non-BankSA account is held
Postcode
Dear Sir/Madam, please close the following account:
Account Holder Name(s)
BSB No. Account No. Credit Card Exp
Postal Address
Postcode
Please send me a cheque for the balance of my account to:
Postcode
Please credit my BankSA Account:
BSB No. 1 0 5
Account No. BankSA
Yours faithfully,
Account Holder Signature(s) (all interested parties to sign)
X
Date
dd mm yy dd mm yy
Phone Number Phone Number

Once complete, please forward to the Financial Institution where the account you wish to close is held.

