

Switch Kit Checklist

At First Federal Bank, we make it easy to switch your bank accounts with our First Federal Switch Kit. Our checklist is designed to keep you organized and help you through the entire process.

Please feel free to make an appointment with one of our Customer Service Representatives to help you through this process. At this meeting, we will open your account, set up online banking and help you switch your automatic payments and deposits. Please contact us at 262.542.4448 for further information.

Complete the New Account Information Sheet

Open your new account at First Federal Bank

- To find the branch location closest to you:
 - Visit firstfederalofwisconsin.com/convenient-locations
- Call 262.542.4448 or 800.556.1234

Sign up for First Federal Online Banking and E-statements

- To sign up for online banking, e-mail us your first and last name at banker@firstfederalwisconsin.com and we will email you an application
- Easily track deposits and withdrawals from your new account
- Pay your bills online for free
- View up to 18 months of account history online, anytime

Stop using your old bank account and begin using your First Federal Bank account

- Be sure to leave funds in your former account until all of your checks have cleared and any automatic withdrawals or deposits have been changed to First Federal Bank

Change your automatic withdrawals or payments to your account at First Federal Bank

- Please use one Automatic Withdrawal Authorization Form for each provider
- You may also bring us a list of your payees and companies that credit your account and we will make the change for you
- Some possible automatic withdrawals may include:
 - Gas
 - Cellular Service
 - Gym Membership Dues
 - Cable/Satellite/Internet
 - Mortgage or Other Loan Payments
 - Water
 - Child Support
 - Phone Service
 - Insurance Payments
 - Credit Card Payments

Change your direct deposits to First Federal Bank

- Use the attached Direct Deposit Authorization Form
- Attach a voided First Federal Bank check to this form
- Some possible direct deposits may include:
 - Your paycheck
 - Social Security, pension, retirement or other government deposits
 - Transfers from other financial institutions or accounts

Close your old bank account by notifying your former bank with the Account Closing Request Form

- Once your account is closed, remember to destroy any old checks, deposit slips, ATM or debit cards for security purposes



New Account Information Sheet

If opening a joint account, each person needs to be present at the time of the account opening. Current driver's license or another government photo ID is required to open the account.

Individual Account

Joint Account

Primary Account Holder

Secondary Account Holder

Name

Name

Address (No P.O. Box, please)

Address (No P.O. Box, please)

City, State, Zip Code

City, State, Zip Code

Home Phone

Home Phone

Work or Mobile Phone

Work or Mobile Phone

E-mail address

E-mail address

Additional Information

Additional Information

Social Security Number

Social Security Number

Driver's License Number

Driver's License Number

Driver's License Issue/Expiration Date

Driver's License Issue/Expiration Date

Date of Birth

Date of Birth

Mother's Maiden Name

Mother's Maiden Name



New Account Information Sheet *(continued)*

Employer Information

Employer

Position/Title

Employer Phone Number

Signature

Signature

Employer Information

Employer

Position/Title

Employer Phone Number

Date

Date



Automatic Withdrawal Authorization

Organization Name: _____

Organization Address: _____

Account # With Your Organization: _____

To Whom It May Concern:

Please discontinue withdrawing \$ _____ (amount) on _____ (date) from the following bank account

Financial Institution: _____

Financial Institution Account Number: _____

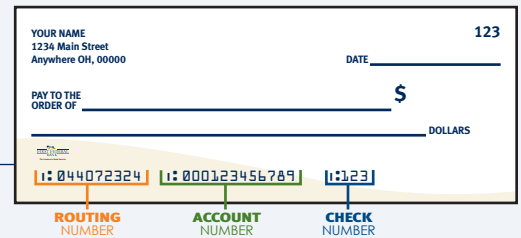
Financial Institution Routing Number: _____

And begin making them from my new account:

Financial Institution: FIRST FEDERAL BANK OF WISCONSIN

First Federal Bank Account Number: _____

First Federal Bank ABA Routing Number: 275971692



Please contact me at the phone number below with questions.

Name(s) on Account: _____

Address: _____

Phone: _____

Signature _____

Date _____

Signature _____

Date _____



Direct Deposit Authorization

Organization Name: _____

Organization Address: _____

Account # With Your Organization: _____

To Whom It May Concern:

I have recently changed my account to a new bank and would like that my direct deposit be switched to my new account at FIRST FEDERAL BANK OF WISCONSIN. My information is as follows:

Name(s) on Account: _____

Address: _____

Phone: _____

FIRST FEDERAL BANK OF WISCONSIN

1617 E. Racine Avenue
Waukesha, WI 53186
262.542.4448 (p)

First Federal Bank Account Number: _____

First Federal Bank ABA Routing Number: 275971692

Checking **Savings** **Other** _____

Effective Date: _____

Attached is a VOIDED check from my new First Federal Bank account.

This agreement shall remain in effect unless your organization has received written notice of cancellation from me or First Federal Bank of Wisconsin.

Signature _____ Date _____

Signature _____ Date _____



Account Closing Authorization

Bank Name: _____

Bank Address: _____

To Whom It May Concern:

Please close the following account(s) with your bank and issue me a check for the remaining balance to my address.

If you have any questions, please contact me at the information below. I appreciate your help and promptness in this matter.

Account Number	Account Type

Name(s) on Account: _____

Address: _____

Phone: _____

Last 4 Digits of Primary Account Holder SSN #: _____

Sincerely,

Signature

Date

Signature

Date

