

# Switch Kit Checklist

At First Federal Bank, we make it easy to switch your bank accounts with our 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 [www.ffbwi.com/convenient-locations](http://www.ffbwi.com/convenient-locations)
  - Call 262.542.4448

Sign up for First Federal Online Banking and eStatements

- 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 Company
  - Cellular Service
  - Gym Membership Dues
  - Cable/Satellite/Internet
  - Mortgage or other Loan Payments
  - Water Utility Company
  - Child Support
  - 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



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# 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

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**Primary Account Holder**

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**Secondary Account Holder**

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Name

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Name

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Address (No P.O. Box, please)

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Address (No P.O. Box, please)

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City, State, Zip Code

---

City, State, Zip Code

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Home Phone

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Home Phone

---

Work or Mobile Phone

---

Work or Mobile Phone

---

E-mail address

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E-mail address**Additional Information****Additional Information**

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Social Security Number

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Social Security Number

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Driver's License Number

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Driver's License Number

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Driver's License Issue/Expiration Date

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Driver's License Issue/Expiration Date

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Date of Birth

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Date of Birth

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Keyword

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Keyword

The Community Bank Difference

Member FDIC 

# New Account Information Sheet *(continued)*

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## Employer Information

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Employer

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Position/Title

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Employer Phone Number

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Signature

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Date

## Employer Information

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Employer

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Position/Title

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Employer Phone Number

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Signature

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Date



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# 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

YOUR NAME 1234 Main Street Anywhere OH, 00000		DATE _____	123
PAY TO THE ORDER OF _____		\$ _____	
		_____ DOLLARS	
: 044072324	: 000123456789	: 123	
ROUTING NUMBER	ACCOUNT NUMBER	CHECK NUMBER	

Please contact me at the phone number below with questions.

**Name(s) on Account:** \_\_\_\_\_

**Address:** \_\_\_\_\_

**Phone:** \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_



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# 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 my direct deposit to 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 \_\_\_\_\_



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# 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



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