

SWITCH KIT

Making the switch is easy!



BankFirst

IT'S DIFFERENT AT FIRST

www.BankFirstNational.com

Make the switch to Bank First in just **four** easy steps!

We want to make your move to Bank First as easy as possible. That's why we created this Switch Kit with everything you'll need to close your existing accounts and transfer your automatic deposits and withdrawals. You won't even need to visit your old financial institution!

1 Open your Bank First account.

We offer a number of account choices to meet your needs. Complete the account opening form included in this packet and bring it to your nearest Bank First location. After your new account is open, stop using your old account. Use this time to destroy any unused checks, ATM and debit cards, and deposit slips.

2 Change your direct deposits.

Direct Deposit simplifies everything! Use the attached form to give to your employer or other payment source so your funds can be automatically deposited into your new account.

3 Change your automatic payments.

Use the enclosed forms to change all automatic withdrawals or automated payment services. Don't forget about those that use your old debit card number, such as automatic payments online.

4 Close your old accounts.

We can help you fill in the blanks on this form and then you just sign it. This form will notify your old financial institution about the accounts you are closing and gives directions for disbursement of any remaining funds in those accounts. You will need to know your old account numbers in order to close these accounts.

Routing numbers and account numbers.

How to locate them.



Step 1 - Open new account.

I'd like to open...

- Personal Checking Account
- Business Checking Account
- Individual Retirement Account (IRA)
- Statement Savings Account
- Health Savings Account
- Certificate of Deposit (CD)

Individual Account

First Name Middle Last Name

Street Address

City, State, Zip

Mailing Address (if different)

Home Phone Cell Phone

Email Address

Primary Account Holder Information

Social Security Number

Driver's License Number State

Issue Date Expiration Date

Date of Birth

Signature

Joint Account

First Name Middle Last Name

Street Address

City, State, Zip

Mailing Address (if different)

Home Phone Cell Phone

Email Address

Joint Account Holder Information

Social Security Number

Driver's License Number State

Issue Date Expiration Date

Date of Birth

Signature

Please note that Primary and Joint account holders will need to sign an official account form in person before an account can be opened.

Step 2 - Change direct deposits.

Complete this form and submit it to any company or organization who is automatically depositing funds to your existing checking account (payroll, pension, or dividends).

To: Company Name: _____

Address: _____

City, State, Zip: _____

To Whom It May Concern:

I've recently changed my banking relationship to Bank First. Please redirect my direct deposit into my new account, as follows:

Name: _____

Address: _____

City: _____

State: _____ Zip: _____

Social Security Number: _____

New Bank Name: **Bank First**

New Bank Routing Number: **075901134**

New Bank Account Number: _____

Account Type: Checking Savings Loan Payment

I hereby authorize to have my direct deposit switched to my account with Bank First.

Signature: _____ Date: _____

For **Social Security Direct Deposits**, we can assist you with calling the Social Security Administration Direct Deposit Department at 1-800-772-1213 or signing up online at www.ssa.gov/deposit/.

Step 3 - Change automatic payments.

Complete this form and submit it to any company or organization who is automatically withdrawing payments from your existing checking account.

To: Company Name: _____

Address: _____

City, State, Zip: _____

Account/Policy #: _____

My current payment amount is: \$ _____

I am currently paying the Total Amount Due

To Whom It May Concern:

Effective ____/____/____, I hereby authorize to change my automatic payments to the company listed below to come from my account at Bank First.

Name: _____

Address: _____

City: _____

State: _____ Zip: _____

Social Security Number: _____

Please redirect my automatic payment to come from my new account:

New Bank Routing Number: **075901134** _____

New Bank Account Number: _____

Account Type: Checking Savings _____

Signature: _____ Date: _____

Step 4 - Close old accounts.

Complete this form and submit it to your previous financial institution. Make sure all checks have cleared.
Note: IRA (Individual Retirement Accounts) require additional paperwork for tax purposes.

To:

Financial Institution: _____

Address: _____

City, State, Zip: _____

From:

Primary Account Holder: _____

Social Security Number: _____

Secondary Account Holder: _____

This letter serves as an authorization to close the following accounts with your institution:

Account # _____ Account Type: _____

Account # _____ Account Type: _____

Account # _____ Account Type: _____

Send a check for the remaining balance, together with all accrued interest or dividends, to:

Bank First F/B/O _____

Attention: _____

P.O. Box 10, Manitowoc, WI 54221-0010

Bank Routing #: **075901134**

New Customer Account #: _____

Primary Account Holder Signature: _____

Secondary Account Holder Signature: _____

Myself Address for check: _____

Date: _____