

Bank of Wisconsin Switch Kit

A SIMPLE STEP-BY-STEP GUIDE
TO SWITCHING BANKS



**Bank of
Wisconsin**TM
A BRANCH OF BANK OF SUN PRAIRIE

Where communities move forward.

Member FDIC

Welcome to the Bank of Wisconsin! We want to make your move to our bank as easy as possible. Our Switch Kit contains everything you'll need to close your existing accounts and transfer your automatic deposits and withdrawals without having to visit your old financial institution.

Please contact us at 715.449.2556 if you need further assistance.

1



OPEN YOUR BANK OF WISCONSIN ACCOUNT.

We offer a number of accounts to meet your needs. Once your account is open, you will have everything you need to complete your switch to the Bank of Wisconsin.

2



CHANGE YOUR DIRECT DEPOSITS.

Use the attached form to give your employer or other payment source your new account information so that 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 who 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 then you can just sign it. This form will notify your old financial institution about the accounts you are closing and it 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.



..... Routing number

..... Account number

2

CHANGE DIRECT DEPOSITS.

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

To: Company Name: _____

Address: _____

City, State, Zip: _____

To Whom It May Concern:

I have recently changed my banking relationship to Bank of Wisconsin. Please redirect my direct deposit into my new account, as follows:

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

Social Security Number: _____

New Bank Name: **Bank of Wisconsin**

New Bank Routing Number: **075903446**

New Bank Account Number: _____

Account Type: Checking Savings Loan Payment

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

Signature: _____ Date: _____

For Social Security deposits, call the Social Security Administration Direct Deposit Department at 1-866-770-2345 (to reach a representative, hit "zero" each time an option is offered) or sign up on-line by visiting www.ssa.gov.



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Bank of Wisconsin is a branch of Bank of Sun Prairie.

3

CHANGE AUTOMATIC PAYMENTS

Complete this form and submit it to any company or organization that is automatically withdrawing payments from your old 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 the Bank of Wisconsin.

Name: _____

Address: _____

City: _____ State: _____ Zip: _____

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

New Bank & Routing Number: **Bank of Wisconsin 075903446**

New Bank Account Number: _____

Account Type: Checking Savings

Signature: _____ Date: _____

4

CLOSE ACCOUNTS

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

To: Financial Institution: _____

Address: _____

City, State, Zip: _____

From: Primary Account Holder: _____

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: _____

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

Bank of Wisconsin F/B/O: _____
(your name here)

Attention: _____

416 Main St.

PO Box 1

Birnamwood, WI 54414

New Customer Account #: _____

Myself at: _____
(your address here)

Signature: _____ Date: _____

