



## SWITCH TO NEWTON FEDERAL BANK

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1. Open your new checking account at one of our three locations.
2. Stop using your old checking account and let the checks you have written clear.
3. Change your direct deposit to Newton Federal Bank. Just fill out *Form 1* in this packet and give it to your employer, the Social Security Administration or your retirement plan. Include a voided Newton Federal Bank check with your request. Some benefits can be changed by phone, you may call the appropriate agencies to make changes to your direct deposit.
  - a. Social Security Administration - (800)772-1213
  - b. Department of Veterans Affairs – (800)827-1000
  - c. Office of Personnel Administration (Federal Employees)- (888)767-6738
4. Change your automatic payments. You can use *FORM 2* to change any withdrawals or payments that are automatically made from your old account. Don't forget to change those payments that use your debit card number, and automatic payments online.
5. Close your old account. After all checks have cleared your old account, and you have changed your automatic deposits and payments, use *FORM 3* to close your old accounts.



## FORM 1

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Please change the account for my direct deposit:

\_\_\_\_\_  
Date

\_\_\_\_\_  
Company Making Direct Deposit

\_\_\_\_\_  
Company Address

\_\_\_\_\_  
City/State/Zip

I have recently changed to Newton Federal Bank. Please begin making my automatic deposit into my new account.

### ***My Old Bank***

\_\_\_\_\_  
My Old Bank's Name

\_\_\_\_\_  
My Old Bank's Routing Number

\_\_\_\_\_  
My Old Account Number

### ***My New Bank***

\_\_\_\_\_  
My New Bank's Name

\_\_\_\_\_  
My New Bank's Routing Number

\_\_\_\_\_  
My New Account Number

If you have any questions about this request, please call me. Thank you.

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City, State, Zip

*Please include a voided Newton Federal Bank check with your request.*

**FORM 2**

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\_\_\_\_\_  
Date

\_\_\_\_\_  
Company Making Withdrawal

\_\_\_\_\_  
Company Address

\_\_\_\_\_  
City/State/Zip

I have recently changed to Newton Federal Bank. Please stop making withdrawals from my old account, and start making them from my Newton Federal Bank account.

***My Old Bank***

_____ My Old Bank's Name	
_____ My Old Bank's Routing Number	
_____ My Old Account Number	
_____ For (payment or reason)	
_____ Date of Withdrawal	\$ _____ Amount

***My New Bank***

_____ My New Bank's Routing Number	
_____ My New Account Number	
_____ Beginning Date	\$ _____ Amount

Please call me if you have any questions regarding this request.

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

*Please include a voided Newton Federal Bank check with your request.*



*FORM 3*

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\_\_\_\_\_  
Date

\_\_\_\_\_  
Bank Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip

Please close my account and send a check for the balance remaining to the address below.

\_\_\_\_\_  
Account Number

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name (please print)

\_\_\_\_\_  
Co-signer Signature

\_\_\_\_\_  
Co-signer Name (please print)

\_\_\_\_\_  
Address

\_\_\_\_\_  
City/State/Zip



## SWITCH KIT TRANSFER CHECKLIST

	Company/ Financial Institution	Account Number	Type of Account	Date Mailed or Contacted	Follow-Up Date	Item Complete
<b>Direct Deposit</b>						
<b>Direct Deposit</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Automatic Payment</b>						
<b>Account Closure</b>						
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Notes:

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*Please make sure that all automatic payments and direct deposit requests have been processed prior to closing your account. This process can take 1-2 months to take effect.*