

# Switch Kit

**A simple, step-by-step guide for switching to First Commons Bank**



Come into one of our branches; enjoy a cup of coffee while we help you ...

- Open your new account
- Streamline changing your bank
- Transfer your bill pay
- Enroll in online and mobile banking
- Establish direct deposit
- Set up other key banking transactions

## Welcome to the First Commons Bank Switch Kit!

A switch to First Commons Bank takes the work out of banking.

The First Commons Bank Switch Kit is designed to streamline the transition to your new First Commons Bank account.

Our team of Client Service Representatives are there to guide you every step of the way. Stop by a local banking office, or call us at

**617•243•4400.**

First Commons Bank is all about our people; clients, employees, and our communities.

MEMBER  
FDIC



### 3 steps for a simple switch

#### Step 1

#### Preparing for the Switch

- ✓ Open a First Commons Bank account
- ✓ Organize your banking information

#### Step 2

#### Making the Switch

- ✓ Enroll in online banking
- ✓ Transfer your direct deposits
- ✓ Update your automatic withdrawals

#### Step 3

#### After you Switch

- ✓ Close your old account

# Automatic payment, bill payment, and direct deposit organizer

If you have not already opened a First Commons Bank account, stop by a local banking office or call us at **617•243•4400**.

1. Write your new First Commons Bank account number and ABA routing number below for easy reference.

Your new First Commons Bank account number: \_\_\_\_\_

Your new First Commons Bank ABA routing number: **011307213**

Financial center address: \_\_\_\_\_

2. Gather all of your recurring payments and direct deposit information.

- List the companies *making* automatic deposits or direct deposits of payroll into your account:

Amount	Company	Address	Account No.

- List the companies *taking* automatic deductions from your account:

Amount	Company	Address	Account No.

3. Gather details of any activity that has occurred since your last statement, either online, at your bank, or in your check register. Consider any ATM withdrawals, checks, or debit card purchases you may have made. List pending activity below:

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# Deposit authorization change form

1. Attach a personal check from your new First Commons Bank account with the word "VOID" written in large letters in ink across the front. *Do not* sign the check.
2. Complete, sign, and date the form.
3. Submit to each institution that is currently authorized to make automatic deposits to your account.

## To whom it may concern:

Please accept this letter as authorization to change the bank account information for my direct deposits. My information is as follows:

Institution name: **First Commons Bank**

Institution address: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account number with institution (if applicable): \_\_\_\_\_

Deposit amount: \_\_\_\_\_

I currently have deposits going to:

Financial institution: \_\_\_\_\_

Account number: \_\_\_\_\_

ABA routing number: \_\_\_\_\_

Deposit amount: \_\_\_\_\_

I am aware that some direct deposits require advance notice of changes. Please include those notice periods when determining the new effective date. Please switch my direct deposits to the account listed below.

### **FIRST COMMONS BANK, 718 Beacon Street, Newton Centre, MA 02459**

I wish to deposit to my First Commons Bank Account: (check one, if applicable)

Entire Net Pay \_\_\_\_\_ % OF NET PAY       Specific amount \$ \_\_\_\_\_

Account type:     Checking       Savings

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

ABA Routing Number: **011307213**

I hereby authorize: \_\_\_\_\_  
(Employer or Fund Originator)

to initiate credit entries and, if necessary, to initiate any debit entries and adjustments to correct any erroneous credit entries to my account at First Commons Bank. If applicable, attached is a voided check from my account. If you have any questions regarding this transaction, please call me at the phone number listed on this form. Please send me written confirmation of when the change will be effective. Thank you for your cooperation.

Signature: \_\_\_\_\_

Phone number: \_\_\_\_\_ Date: \_\_\_\_\_

# Automatic payment or withdrawal authorization change form

1. Attach a personal check from your new First Commons Bank account with the word "VOID" written in large letters in ink across the front. *Do not* sign the check.
2. Complete, sign, and date the form.
3. Submit to each institution that is currently authorized to make automatic deductions from your account.

## To whom it may concern:

Please accept this letter as authorization to change bank account information for my automatic deductions. My information is as follows:

Institution name: \_\_\_\_\_

Institution address: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account number with institution (if applicable): \_\_\_\_\_

Withdrawal amount: \_\_\_\_\_

I currently have automatic deductions coming from:

Financial institution: \_\_\_\_\_

Account number: \_\_\_\_\_

ABA routing number: \_\_\_\_\_

Withdrawal amount: \_\_\_\_\_

I am aware that some automatic deductions require advance notice of changes. Please include those notice periods when determining the new effective date. Please switch my automatic deductions to the account listed below.

### **FIRST COMMONS BANK, 718 Beacon Street, Newton Centre, MA 02459**

Please update my automatic deductions to my First Commons Bank Account:

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

ABA Routing Number: **011307213**

Account Type:  Checking  Savings

I hereby authorize: \_\_\_\_\_  
(Institution name)

to initiate debit entries and, if necessary, to initiate any credit entries and adjustments to correct any erroneous debit entries to my account at First Commons Bank. If applicable, attached is a voided check from my account. If you have any questions regarding this transaction, please call me at the phone number listed on this form. Please send me written confirmation of when the change will be effective. Thank you for your cooperation.

Signature: \_\_\_\_\_

Phone number: \_\_\_\_\_ Date: \_\_\_\_\_

# Account close request

1. Complete, sign, and date this form.
2. Please make sure your new First Commons Bank account is active before you close your existing account.
3. Send this form to your old bank once your existing checks, deposits, payments, and pre-authorized transfers have cleared.

## To whom it may concern:

Please accept this letter as authorization to close my bank account.  
My information is as follows:

Please close my bank account(s) as described below, effective (date): \_\_\_\_\_

Financial institution name: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account number: \_\_\_\_\_

Account type:  Checking  Savings

Please send me a cashier's check for the balance on this account: \$ \_\_\_\_\_

Payable to: \_\_\_\_\_

Customer address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If you have any questions, please call me at: \_\_\_\_\_  
(phone number)

Second account (if applicable)

Financial institution name: \_\_\_\_\_

Name on account: \_\_\_\_\_

Account type: \_\_\_\_\_

Account number: \_\_\_\_\_

Account type:  Checking  Savings

Please send me a cashier's check for the balance on this account: \$ \_\_\_\_\_

Payable to: \_\_\_\_\_

Customer address: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

If you have any questions, please call me at: \_\_\_\_\_  
(phone number)

Signature: \_\_\_\_\_

Phone number: \_\_\_\_\_ Date: \_\_\_\_\_



718 Beacon Street, Newton Centre, MA 02459

161 Linden Street, Wellesley, MA 02482

[www.firstcommonsbank.com](http://www.firstcommonsbank.com)

617 • 243 • 4400

- Personal banking
- Residential lending
- Business banking
- Commercial lending