

AnchorBank's Complete Switch Kit

Choosing to switch financial institutions is an important decision, and we'd like to thank you for your interest in AnchorBank. Follow the steps of our Complete Switch Kit to move your Direct Deposits and Automatic Payments to AnchorBank quickly and seamlessly.

1 Track Your Personal Accounts

Use the attached Personal Account Tracker to track your deposits and withdrawals that are in transition.

2 Change your Direct Deposit(s)

Complete a Change Payroll Direct Deposit Form to switch your current direct deposit(s); for example, employer, social security or military, to your new AnchorBank account.

In order to successfully complete this step, you will need to fill out the form, print it out, sign it and send one form to each party that establishes automatic direct deposits on your behalf. Please be sure to have these items on hand before filling out the form:

- Name and address of employer or depositor
- Account and routing number of the account from your old financial institution
- New AnchorBank account number

3 Switch Automatic Payments

A Change Automatic Withdrawal Form is required to make sure recurring, automatic payments or withdrawals such as mortgage or car payments come from your AnchorBank account. Please be sure to have these items on hand before filling out the form:

- Name and address of companies making the withdrawal
- Amount you are currently withdrawing and date of withdrawal
- Account and routing number of the account from your old financial institution
- New AnchorBank account number

Make Paying Bills Even Easier

At AnchorBank, you can also enjoy **online banking, e-statements and bill pay**. Online bill pay makes surprisingly short work of a stack of bills. You can:

- Make all payments from one screen
- Pay virtually anyone you can write a check to, from your credit card company to your baby sitter
- Set up recurring or one-time payments
- Avoid the hassle of writing checks, searching for stamps or trips to the post office

Bill pay is free with our Direct Checking, Admiral Checking™ and Commodore Checking™ accounts. If you're already an online banking customer, you can sign up for e-statements and bill pay by accessing your online banking account. If you haven't already signed up for online banking, visit anchorbank.com to enroll today.

4 Close your old account(s)

Once all your checks have cleared and your direct deposits and automatic payments have been successfully switched to AnchorBank, complete the Close Account Form to notify your old bank that you would like to close your account.

Keep in mind, some financials may require additional information to complete this process. Please be sure to have these items on hand before filling out the form:

- Address of your previous financial institution
- Account number(s) for the accounts you are closing

Some things to remember...

Do you have automatic payments established for any of the following?

- Mortgage or Rent
- Home Equity Loan/Line of Credit
- Auto Loan or Lease
- Student Loan
- Credit Card
- Insurance
- Gas
- Electric
- Phone/Cell Phone
- Internet Service Provider
- Membership Fees
- Safe Deposit Box Rental

Have you considered all sources of income that may be eligible for direct deposit?

- Company or Employee Payroll
- Pension or Retirement Plan
- Social Security
- Stocks/Bonds

Please verify with these sources that direct deposits and automatic withdrawals have been changed after submitting the appropriate forms.

If you have questions while going through this process, simply contact your local branch or call 1-800-25 ANCHOR (252-6246) and we'd happy to assist you.

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PERSONAL BANKING HOME LOANS INVESTMENT SERVICES BUSINESS BANKING

Personal Account Tracker

Use this chart to track your deposits and withdrawals that are in transition. Check them off as your transactions are removed from your former account and appear on your new AnchorBank account.

Name of Business/Organization	Type of Account	Date Letter Sent	Transition Confirmed
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
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	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		
	<input type="checkbox"/> Deposit <input type="checkbox"/> Withdrawal		

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Change Payroll Direct Deposit Form

Send this form to employers, government offices or financial institutions that make direct deposits (payroll, Social Security, CD interest payments, etc.) into your account.

Date _____

Employer's/Depositor's Name: _____

Employer's/Depositor's Address: _____

Employer's/Depositor's City, State, Zip: _____

You are currently depositing MY ENTIRE PAYCHECK PART OF MY PAYCHECK (Choose one) into the following account:

Old Financial Institution: _____

Routing Number: _____

Account Number: _____

Please stop making deposits to that account and instead send them to:

AnchorBank, fsb

PO Box 7933, 25 W. Main St., Madison, WI 53703

Routing Number: **275971087**

Account Number (10 digits): _____

Effective Date: _____

If you have any questions about this request please call me at (_____) _____

During the day In the evening (Choose one)

Name (Please Print): _____

Address: _____

City, State, Zip: _____

Signature: _____

MEMO _____ ⑆275971087⑆ ⑆ 01 ⑆ 00000000 ⑆ 00001	This is a sample of an AnchorBank check.
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↑ Routing # (9 digits) ↓

↑ Account # (10 digits) ↓

↑ Check # ↓

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Change Automatic Withdrawal Form

Send this form to any company or organization (utilities, insurance companies, subscriptions, etc.) that takes regular electronic payments out of your account.

Date _____

Name of Company Making Withdrawal: _____

Company's Address: _____

Company's City, State, Zip: _____

You are currently withdrawing \$ _____ (Amount)

For my: _____ (What payment is for)

On: _____ (Recurring date)

From the following account:

Old Financial Institution: _____

Routing Number: _____

Account Number: _____

Please stop making withdrawals from that account and instead make them from:

AnchorBank, fsb

PO Box 7933, 25 W. Main St., Madison, WI 53703

Routing Number: **275971087**

Account Number (10 digits): _____

Effective Date: _____

If you have any questions about this request please call me at (_____) _____

During the day In the evening Choose one

Name (Please Print): _____

Address: _____

City, State, Zip: _____

Signature: _____

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Close Account Form

Use this form to close your account at the financial institution you are leaving.

Date _____

Financial Institution Name: _____

Financial Institution Address: _____

Financial Institution City, State, Zip: _____

Please accept this request as my authorization to close the following accounts.

Type: Checking Savings / Money Market Other: _____

Account Number: _____

Type: Checking Savings / Money Market Other: _____

Account Number: _____

Type: Checking Savings / Money Market Other: _____

Account Number: _____

Type: Checking Savings / Money Market Other: _____

Account Number: _____

Type: Checking Savings / Money Market Other: _____

Account Number: _____

Please send a check for the remaining balance to me at the address listed below.

If you have any questions about this request please call me at (_____) _____

During the day In the evening (Choose one)

Name (Please Print): _____

Address: _____

City, State, Zip: _____

Signature _____

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