

Bank *Forward* Switch Kit



BANK *of*
BURLINGTON

BANK FORWARD

It's as easy as 1, 2, 3

1. Open a new Bank of Burlington account
2. Transfer your automatic deposits and payments to your new account.
This is one of the most important parts of making an easy bank change and we are more than happy to help with the process.
3. Close your old account
 - Make sure all outstanding checks have cleared your old account
 - Leave enough funds in your old account to cover any automatic payments until they have been switched to your new account
 - Some automatic transactions may be on a schedule other than monthly

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Switching to Bank of Burlington is easy. Simply follow these steps:

1. Open your Bank of Burlington account. It's easy to open your account at Bank of Burlington online or at our South Burlington location.
2. Remember to stop using your old account. Be sure to keep enough funds to cover your automatic payments and outstanding checks until you fully transition those to your new Bank of Burlington account.
3. Identify all your direct deposits and automatic payments. Use our *Bank Forward* Switch Kit Tracking Form. Your current bank statements are a great resource to identify all the companies involved.
4. Transfer all your direct deposits or automatic deposits to your new Bank of Burlington account. You will need the following to make the change: a. direct deposit processor name and address b. New Bank of Burlington account number c. Bank of Burlington routing number 011601456. Use this information to complete our direct deposit change request form and send it to the company that processes the direct deposit into your account.
5. Transfer automatic payments, withdraws/debits to Bank of Burlington. You need the following: a. Copy of your latest statement with your billing information b. Bank of Burlington account number c. Bank of Burlington routing number 011601456. Use this information to complete the Automatic Payments/ Transfers form and send it to the appropriate billing address.
6. Closing your old bank account(s): a. Make sure all checks and debits have cleared. b. Leave enough funds in your account(s) to cover any automatic payments that may need to be withdrawn. c. Double check maturity dates of account(s) in order to avoid possible penalties. Close your account by completing the Request to Close Account form we have provided. Mail the signed form to your former financial institution.

Q&A

- Q: If I have direct deposit or automatic payments, is it hard to switch to my new account?
- A: *We make the process as simple for you as possible by providing this easy-to-use kit.*
- Q: How long does the process take to get everything switched over?
- A: *The amount of time will vary depending on the policy/process of the business(es) that handles the direct deposit or automatic payments. It may take a month or two before all your checks clear from your old account and the automatic deposits/payments are finalized.*
- Q: Can you help me with making the change to my new Bank of Burlington account?
- A: *We are more than happy to help you with the process.*
- Q: Can I call my old bank to close my account today?
- A: *You will want to make sure all your outstanding checks have cleared and that you have switched automatic deposits/payments are switched before closing your old account.*



Bank *Forward* Switch Kit Tracking Form

Bank of Burlington Account # _____

Bank of Burlington ABA Routing Number: 011601456

Thank you for choosing Bank of Burlington.
We appreciate your choosing us for your banking needs.

Use this form to help keep track of switching your automatic payments and deposits to your new Bank of Burlington account.

Helpful Tip: Can't remember all the automatic transactions (deposits, withdrawals and transfers) that need to be changed?
Your current bank statement is a great source for this information. *(Don't forget some of your automatic transactions may be on a schedule other than monthly.)*

Automatic / Direct Deposits

Company Name/Address	Date Form Sent	Status
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Automatic Payments

Company Name/Address	Date Form Sent	Status
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Before you close your old account , make sure the direct deposits and automatic payments are going to/coming from your new Bank of Burlington account and all your outstanding checks have cleared.



Direct Deposit – Change of Bank Notification

To:

Company Name: _____

Address: _____

City, State, Zip _____

From:

Customer Name: _____

Address: _____

City, State, Zip _____

I recently changed my primary bank to Bank of Burlington. Please send my Direct Deposit transaction to Bank of Burlington effective ____ / ____ / 20___. Attached is a voided check from my new account to support this request. Thank you for making this change for my direct deposit. Let me know if you have any questions or concerns.

SSN / EIN #: _____

Signature: _____

Printed Name: _____

Date: ____ / ____ / 20__

Phone # _____

Email: _____

Bank of Burlington Account #: _____

Bank of Burlington Routing # 011601456

Helpful hint: Be sure to check with the companies involved to make sure they will accept this form. Some require you to use their form to make this type of a change.



Automatic Payments – Change of Bank Notification

To:

Company Name: _____

Address: _____

City, State, Zip _____

From:

Customer Name: _____

Address: _____

City, State, Zip _____

I recently changed my primary bank. Please debit my new Bank of Burlington account effective ____ / ____ / 20__ for my automatic payment/transfer with your company. Attached is a voided check from my new account to support this request. Thank you for making this change for my account with you. Let me know if you have any questions or concerns.

SSN / EIN #: _____

Signature: _____

Printed Name: _____

Date: ____ / ____ / 20__

Phone # _____

Email: _____

Bank of Burlington Account #: _____

Bank of Burlington Routing # 011601456

Helpful hint: Be sure to check with the companies involved to make sure they will accept this form. Some require you to use their form to make this type of a change.



Request to Close Account

To:
Bank Name: _____
Address: _____
City, State, Zip _____

From:
Customer Name: _____
Address: _____
City, State, Zip _____

I recently changed my primary bank. Please debit my new Bank of Burlington account effective ____ / ____ / 20__ for my automatic payment/transfer with your company. Attached is a voided check from my new account to support this request. Thank you for making this change for my account with you. Let me know if you have any questions or concerns.

Names on the account: _____
Account #: _____
Type of Account: _____
Joint Account: _____
Signature: _____
Printed Name: _____

If you have any questions, please contact me at:
Phone #: _____
Email: _____@_____._____
Joint Account: _____
Signature: _____
Printed Name: _____

Helpful hint: Be sure to check with the companies involved to make sure they will accept this form. Some require you to use their form to make this type of a change.



Superior Service

Responsive; Customized Loan / Deposit Solutions; Ability to apply discretion; Access to decision makers



Commercially-Focused

Bank of Burlington is focused on Commercial Businesses. The small organizational structure enables creative lending solutions to grow small and mid-size businesses



Tech-Forward

Best-in-class Suite of Digital Tools & Services; Fully Digital Experience — bank anywhere, even from your couch



Market Knowledge

Bank of Burlington is guided by a deep understanding and commitment to local market landscape, enabling nimble and flexible local decision-making.



