

3 STEPS TO SWITCH

Switch to Banking Just Done Better.

You can make the move to Monson Savings Bank in three easy steps. Everything you'll need is provided in this helpful Switch Kit. We can't wait to welcome you to Monson Savings, where you'll enjoy a better experience for all your banking needs!

1

Open your new account.

Apply online in minutes or visit your local branch to open your new Monson Savings Bank account(s).

2

Switch your direct deposits & automatic withdrawals.

If you have any automatic transactions, use the provided forms to seamlessly switch them to Monson Savings Bank.

3

Close your old account.

Now you're ready to switch. Simply fill out the provided form to close your old account. Any remaining account balance will be transferred to Monson Savings Bank.

3 STEPS TO SWITCH

Direct Deposit Authorization

Notification of Direct Deposit Authorization Change

☐

New Authorization

☐

Change to Prior Authorization

Company or Employer:

Address:

City, State, Zip:

Phone Number:

MONSON SAVINGS BANK, 146 MAIN STREET, MONSON MA, 01057, 413-267-4646

Place an X next to your desired option.

Monson Savings Bank Routing #

211871219

☐

Monson Savings Bank **CHECKING**

Account #

☐

Net Pay

☐

Specific Amount \$:

☐

Monson Savings Bank **SAVINGS**

Account #

☐

Net Pay

☐

Specific Amount \$:

I/We authorize the COMPANY (named above) to initiate credit entries and, if necessary, to initiate any debit entries to correct an erroneous credit entry to my/our account at the Financial Institution (identified below), for the purpose of automatically depositing funds to my/our account. I/We acknowledge that the origination of these transactions must comply with the provisions of U.S. Law.

I/We understand that this authorization replaces any previous authorization and will remain in full force and effect until the COMPANY has received written notification from me (or either of us) of its termination in such time and in such manner as to afford the COMPANY and Financial Institution a reasonable opportunity to act on it.

Signature:

Date:

Name:

Address:

City, State, Zip:

Phone Number:

Use the fillable fields to fill out this form online, or you can print the form and complete it.

Use this form to authorize your employer, retirement and pension funds, or any other agency to deposit your payment directly into your Monson Savings account. Use one form for each direct deposit.

Direct Deposit Checklist:

Use this list to remember all your direct deposits you need to transfer. These are the most common direct deposits.

____ Payroll
____ Investments
____ Retirement Plans
____ Social Security



Monson Savings
Your Bank Forever

3 STEPS TO SWITCH

Automatic Withdrawal Authorization

Notification of Withdrawal Authorization Change

Name of Company:

Account Number:

Payment Amount:

Address:

City, State, Zip:

Phone Number:

Please cancel all automatic withdrawals from **my old institution**:

Financial Institution:

Account # Routing #

Please make all future automatic withdrawals from **my new institution**:

Financial Institution: **Monson Savings Bank**

Account # Routing # **211871219**

This authorization will remain in effect until I have submitted to you a new authorization, or until you have been notified by me in writing that this authorization has been changed or revoked.

Signature: Date:

Name:

Address:

City, State, Zip:

Phone Number:

Use the fillable fields to fill out this form online, or you can print the form and complete it.

Use this form to authorize a change to any automatic payment, deductions, or withdrawals from your account. Use one form for each automatic withdrawal. Or, many companies make it easy to change your account on record online on their website.

Automatic Withdrawal Checklist:

Review a few months of your transaction history and take note of auto payment dates and amounts. Use this helpful list of commonly used auto payments.

- ☐ Home Mortgage
- ☐ Auto Loans
- ☐ Utilities
- ☐ Insurance
- ☐ Cable/Internet
- ☐ Gym/Club Memberships
- ☐ Credit Cards
- ☐ Investments
- ☐ Subscriptions
- ☐ Charity Donations

3 STEPS TO SWITCH

Account Closure Authorization

Notification of Account Closure Authorization Change

To Whom It May Concern:

Financial Institution:

Address:

City, State, Zip:

Please close the following account(s):

Account #:

☐

Checking

☐

Savings

Please close any debit cards, online banking, bill pay or other applications associated with these accounts.

Account #:

☐

Checking

☐

Savings

Account #:

☐

Checking

☐

Savings

Account #:

☐

Checking

☐

Savings

Please send the remaining balance to:

Place an X next to your desired option.

☐

Please deposit directly to my new account at Monson Savings Bank.

Account #

Routing # **211871219**

☐

Please forward me a check payable to my name to my address listed below.

MONSON SAVINGS BANK, 146 MAIN STREET, MONSON MA, 01057

Primary Signature: Date:

Joint Signature: Date:

Name:

Address:

City, State, Zip:

Phone Number:

You can authorize your remaining balance to be automatically deposited into your new Monson Savings account(s) or paid by a check payable to your name.

Bring this completed form to close your account(s) at your former financial institution. Be sure to verify any outstanding items have cleared your old account and that your direct deposits have been posted to your new MSB account.

Congratulations!

You had to sign your name a few times...but submitting these forms completes your switch to a truly better banking experience. We can't wait to show you the difference a local partner makes.

Welcome to Monson Savings Bank!

Former Financial Institution: If you have any questions, please do not hesitate to contact me. If what has been provided is not sufficient to close my accounts, please call me and/or send me the needed documents.



Monson Savings
Your Bank Forever

	Company / Financial Institution	Account Number	Type of Account	Date Mailed or Contacted	Follow-up Date	Item Complete
Direct Deposit						
Direct Deposit						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Automatic Payment						
Credit Card Balance Transfer						
Credit Card Balance Transfer						
Automatic Closure						
Automatic Closure						