

RIGHT THERE WITH

# EASY SWITCH YOU



## SWITCHING TO MIDDLESEX SAVINGS BANK IS EASY.

*You'll find that we can provide more value than many other banks. We strive to make banking work better for you by combining today's technology with the personal touch. We take the time to match you to the right account to ensure that you're happy and comfortable for years to come. Because that's how long we want to be your bank.*

*Get started by making the move to Middlesex with the checklist below. Utilize this guide to organize your new Middlesex checking account, direct and automatic deposits, and recurring payments.*

### NOTE: YOU WILL NEED THE FOLLOWING ITEMS TO COMPLETE YOUR APPLICATION:

#### STOPPING BY A BRANCH?

To open a checking account in person, you'll need:

- Personal information, including address, phone number, and Social Security number.
- Two forms of identification (ID)
- Primary ID such as Massachusetts Driver's License, Massachusetts issued ID Card, Passport or Passport Card.
- Secondary ID such as student ID with photo, major credit card, utility bill, or US Military ID card.
- Money to fund your new account. You can use a current account from another bank, credit or debit card, or cash.

#### APPLYING ONLINE?

To open a checking account online, you'll need:

- Personal information, including address, phone number, and Social Security number.
- Identification, such as a driver's license, state ID, passport or military ID.
- Account and routing numbers or a credit card number to fund your account.

*continued on next page*

## TO START MAKING THE SWITCH

### 1. OPEN YOUR MIDDLESEX SAVINGS BANK ACCOUNT.

### 2. GATHER YOUR ACCOUNT INFORMATION.

- A. Bank routing transit number: \_\_\_\_\_  
 B. Account number: \_\_\_\_\_

### 3. SET UP ACCESS TO YOUR NEW ACCOUNT THROUGH ONLINE BANKING.

- a. Visit [www.middlesexbank.com/enroll](http://www.middlesexbank.com/enroll)  
 b. Complete and submit the form



*Tip: You will need the account and routing number of any accounts. We will test the accounts with a micro deposit.*

### 4. ADD YOUR ACCOUNTS FROM OTHER BANKS.

- ▶ Login to Online Banking
- ▶ Select 'Transfers'
- ▶ Select 'Add external account' and follow prompts.

### 5. SWITCH YOUR DIRECT DEPOSITS AND OTHER AUTOMATIC DEPOSITS TO YOUR NEW ACCOUNT.

Redirect your direct deposit from your old bank account to your new Middlesex account.

- Direct Deposit #1: \_\_\_\_\_  
 Direct Deposit #2: \_\_\_\_\_

### 6. TRANSFER RECURRING PAYMENTS.

Payment	Company	Payment Due Date
<input type="checkbox"/> Mortgage/Rent	_____	_____
<input type="checkbox"/> Insurance	_____	_____
<input type="checkbox"/> Internet Provider	_____	_____
<input type="checkbox"/> Cell Phone	_____	_____
<input type="checkbox"/> Telephone	_____	_____
<input type="checkbox"/> Cable/TV	_____	_____
<input type="checkbox"/> Electric	_____	_____
<input type="checkbox"/> Gas/Oil	_____	_____
<input type="checkbox"/> Water	_____	_____
<input type="checkbox"/> Auto Loans	_____	_____
<input type="checkbox"/> Fitness	_____	_____

### 7. CLOSE YOUR OLD BANK ACCOUNT IF YOU WON'T BE USING IT ANYMORE.

Make sure checks you have written have been cleared, and all automatic payments and deposits have ended. Close out your account and have the remaining balance sent to you.



*Tip: Closing unused accounts reduces the risk of potential fraud.*

### WE'RE HERE TO HELP.

Our experienced team is on hand to help you every step of the way to make the switch easy and convenient.



Call Us



Email Us



Visit Us



Book an Appointment

