



**Windsor Federal**

SAVINGS

## Windsor Federal Savings SwitchKit *Express*

Hassle-Free Switching...that's what we offer! Switching banks has never been easier when you use our **SwitchKit Express**. Simply follow the steps outlined below, print the forms that you need and you're on your way to a banking relationship with the best neighborhood community bank in the area! Need help? No problem! Our friendly staff will assist you in completing each of the forms at the time you open your account. Hope to see you soon!

**1**

### Open a Windsor Federal Savings Checking Account

If you haven't opened your WFS checking account yet, stop by any branch and we will be happy to help you decide which account best fits your needs. Print, and then fill out our **SwitchKit Express New Account Information Form**. Bring this with you when you open your account.

250 Broad Street, Windsor, CT 06095 • 860-688-8511  
321 Windsor Avenue, Windsor, CT 06095 • 860-251-6172  
695 Poquonock Avenue, Windsor, CT 06095 • 860-298-6169

21 Hartford Avenue, Granby, CT 06035 • 860-653-4548  
48 Jerome Avenue, Bloomfield, CT 06002 • 860-242-6062

**2**

### Establish or Transfer Your Direct Deposit

Notify anyone making direct deposits into your previous bank account(s) that you want to transfer your direct deposit to your new account at Windsor Federal Savings. Print, and then fill out our **SwitchKit Express Direct Deposit Form** and give the completed form to each of your automatic depositors. Check with your employer or source of income to make sure no other forms are required.

Social Security Direct Deposit: Call the Social Security Administration at 1-800-772-1213 or go to [www.ssa.gov/deposit/howtosign.htm](http://www.ssa.gov/deposit/howtosign.htm).

Veteran's Benefits: 1-877-838-2778      Federal Employees: 1-888-767-6738  
Railroad Retirement: 1-800-808-0772

**3**

### Establish or Transfer Any Automatic Payments

Notify any company that is automatically deducting payments from your previous bank account(s) (mortgage, insurance, gym membership, newspaper, cell phone, etc.) that you want to transfer those automatic payments to your new account at Windsor Federal Savings. To do this, simply print and then fill out our **SwitchKit Express Automatic Payments Request Form** and send to each company.

**4**

### Close Your Old Account

Your direct deposits have been switched to your WFS account. All automatic payments are now being debited from your WFS account. All checks have cleared and your old account is inactive. Now is the time to close your old account. Print, fill out and send our **SwitchKit Express Account Closing Request Form** to your old bank to notify them of your decision to close your account(s).



**1**

**SwitchKit *Express***  
**New Account Information Form**

Name:		
Address:		
City:	State:	Zip:
Home Phone #:		
Business Phone #:		
Cell Phone #:		
Date of Birth:		
Social Security Number:		
Driver's License #:		
Driver's License Issue Date:		
Driver's License Expiration Date:		
2nd Form of ID:		
2nd Form of ID#:		
2nd Form of ID Expiration Date:		
Email Address:		
Email Address:		



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## SwitchKit Express Worksheet

Windsor Federal Savings Bank Information	
Our Name:	Windsor Federal Savings
Our Main Office Address:	250 Broad Street Windsor, CT 06095
Our Routing/ABA Number:	211170237
Our Telephone Number:	860-688-8511
Your Checking Account Number:	
Your Savings Account Number:	
Your Money Market Account Number:	

Your Previous Bank Information	
Bank Name and Address:	
Bank Routing/ABA Number:	
Bank Telephone Number:	
Your Checking Account Number:	
Your Savings Account Number:	
Your Money Market Account Number:	

Direct Deposit Information	
List all employers or organizations that are automatically depositing funds into your old account. (Social Security, VA Compensation, Federal Benefits, Interest Income, etc.). <b>Please note:</b> It can take up to 3 weeks for the change to take effect, so you should make your request just after you receive your payment.	
Employer/Organization Name:	
Amount Direct Deposited:	
Date Last Deposited:	
Employer/Organization Name:	
Amount Direct Deposited:	
Date Last Deposited:	
Employer/Organization Name:	
Amount Direct Deposited:	
Date Last Deposited:	

Member FDIC





# Windsor Federal

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2	<h2 style="color: blue;">SwitchKit <i>Express</i></h2> <h3 style="color: blue;">Direct Deposit Authorization Form</h3>
	<p>If you wish to set-up or transfer Direct Deposit of your paycheck, income from investments, pension/retirement plans, interest or dividends, you will need to complete this form. Check with your employer/organization to make sure no additional information or forms are required. Please contact your employer's Human Resource or Payroll Department if you have any questions about their process. <b>Please note:</b> It can take up to 3 weeks for the change to take effect, so you should make your request just after you receive your pay check / payment.</p>

To (Employer or Organization):

From (Accountholder Name):

Joint Accountholder Name (if applicable):

Address:

City, State, Zip:

Social Security Number:

Home Phone:	Work Phone:	Cell Phone:
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**Effective immediately, please STOP sending my direct deposits to:**

Name of previous Financial Institution:

Account Number:

**Effective immediately, please BEGIN sending my direct deposits to:**

**WINDSOR FEDERAL SAVINGS**  
**Attn: Customer Service Center**  
**250 Broad Street**  
**Windsor, CT 06095**

**WFS Phone #: 860-688-8511**

**WFS Routing/ABA#: 211170237**

Checking Account Number:	Amount of Deposit:
Checking Account Number:	Amount of Deposit:
Savings Account Number:	Amount of Deposit:
Savings Account Number:	Amount of Deposit:
Money Market Account Number:	Amount of Deposit:
Money Market Account Number:	Amount of Deposit:

Effective Date:

Signature:



**3**

## SwitchKit *Express*

### Automatic Payment Request Form

Fill out this form and send it to each company that is automatically withdrawing payments from your previous checking account. Keep in mind; this may take up to 2 weeks so you may want to make any payments to avoid late fees. Refer to the Automatic Payment Worksheet you filled out for a list of payees.

To (Payee):

Payee Account Number:

From (Accountholder Name):

Address:

City, State, Zip:

Home Phone:

Work Phone:

Cell Phone:

**Effective immediately, please STOP withdrawing automatic payments from:**

Name of previous Financial Institution:

Account Number:

**Effective immediately, please BEGIN withdrawing automatic payments from:**

**WINDSOR FEDERAL SAVINGS  
Attn: Customer Service Center  
250 Broad Street  
Windsor, CT 06095**

**WFS Phone #: 860-688-8511**

**WFS Routing/ABA#: 211170237**

Account Number:

Checking

Savings

Effective Date:

Signature:



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# 4

## SwitchKit Express

### Account Closing Request Form

Fill out this form and send it to your previous bank to close your account(s). Remember to transfer any remaining balances to your new accounts at Windsor Federal Savings.

To Previous Financial Institution:

Address:

City, State, Zip:

Please be advised that effective immediately, I (We) would like to close the account(s) listed below. Please process this request and forward all proceeds, including all accrued interest from these account(s) by check to:

**WINDSOR FEDERAL SAVINGS**  
**Attn: Customer Service Center**  
**250 Broad Street**  
**Windsor, CT 06095**

#### Please close the following account(s):

Account Number:	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> CD (please close out at maturity)
Account Number:	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> CD (please close out at maturity)
Account Number:	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> CD (please close out at maturity)
Account Number:	<input type="checkbox"/> Checking	<input type="checkbox"/> Savings	<input type="checkbox"/> CD (please close out at maturity)

#### If you have questions about this request, please contact me/us immediately:

Account Holder:

Account Holder:

Address:

City, State, Zip:

Home Phone:

Work Phone:

Cell Phone:

#### Attention Windsor Federal Savings

Upon receipt, all funds are to be deposited into my/our account at Windsor Federal Savings.

Account # \_\_\_\_\_

Signature:

Effective Date:

Signature:

Effective Date:

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