

# Switch Organizer

We make it EASY – 1,2,3 simple steps. This switch organizer has everything you need to switch your checking accounts to Dedham Savings!

## 1. OPEN YOUR NEW CHECKING ACCOUNT AT DEDHAM SAVINGS

### Dedham Savings has an account that's just right for you!

Open your new account in one of the following ways - Your Choice

- Stop by any one of our convenient locations
- Save time by opening your account online at [www.dedhamsavings.com](http://www.dedhamsavings.com)

Whichever way you choose, one of our **Customer Service Representatives (CSRs)** will be available to assist you through this **EASY** process.

Your CSR will -

1. Enroll you in our online banking solution, Your Link, and order your Debit MasterCard™ and while we are at it, we'll enroll your phone in Dedhamobile.
2. Set up your first five payees in our automated Bill Pay solution.
3. Explain your overdraft choices and help you decide which option is best for you.

## 2. CHANGE YOUR DIRECT DEPOSITS

Complete our Direct Deposit Authorization Form and give it to your employer, the Social Security Administration and/or your retirement plan provider. You may be able to provide your employer with new account information online. To make things **EASY**, we have also provided a list of phone numbers for government agencies if you prefer to contact them by phone.

## 3. CHANGE YOUR AUTOMATIC WITHDRAWALS

Many companies and service providers allow you to make these changes online. If not, our Automatic Withdrawal Switch Form makes this **EASY**. Refer to your Switch Organizer to ensure that you have included all of your current withdrawals. If any of your providers currently use your debit card number for automatic withdrawals, remember to provide your new card number once it arrives.

## CONGRATULATIONS, IT'S TIME TO CLOSE YOUR OLD ACCOUNT

After verifying all of your checks have cleared and all direct deposits and automatic debits have successfully been transferred to your new account, it is time to close your old account. Let your former bank know that you wish to close your account. Our Account Closing Request Form makes this **EASY**.

**Dedham Savings**  
your bank  
[dedhamsavings.com](http://dedhamsavings.com)

DEDHAM INSTITUTION FOR SAVINGS since 1831  
Member FDIC / Member DIF  Equal Housing Lender  
Member of the SUM™ Program

DEDHAM • NEEDHAM • NORWOOD  
SHARON • WALPOLE • WESTWOOD  
(800) 462-1190

## EASY SWITCH ORGANIZER

**My New Account Information**

**Routing # 211371722**

**Account Number:** \_\_\_\_\_

Use this EASY reference sheet to gather the information needed to switch your account.

### Bill Payments

Company Name	Account Number	Address	Phone Number	Amount

### Direct Deposits

Payment Type	Company	Address	Phone Number
Employee Payroll			
Pensions/Retirement Plans			
Social Security			
Investment Incomes			
Other			

### Automatic Withdrawals

These may include:

Mortgage/Rent	Electric	Auto Loan/Insurance	Investments
Credit Cards	Water	Internet	IRA/Retirement
Gas/Oil	Cable/TV	Telephone	Charity

#### Helpful Resources

**Social Security Admin.**  
800-772-1213  
[www.ssa.gov](http://www.ssa.gov)

**State Retirement Board**  
800-392-6014 (MA only)

#### Helpful Hints:

- Note that some companies or organizations, like the Social Security Administration, may require a special form.
- Automatic withdrawals should take effect within two withdrawal periods. Keep your old account open until all automatic deductions have been switched to your new account. If you don't see the change by this time, please contact the company.
- Direct deposits should take effect within two to three deposit periods. Keep your former account open until all direct deposits have been switched.

## DIRECT DEPOSIT AUTHORIZATION SWITCH FORM

Complete this form to request a direct deposit into your new Dedham Savings account.

### COMPANY INFORMATION

Company Name \_\_\_\_\_ Phone Number \_\_\_\_\_

Company Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

### ACCOUNT INFORMATION

Bank: **Dedham Savings** Bank Routing Number: **211371722** Account Number: \_\_\_\_\_

Account Type:  Checking  Savings  Money Market

Name on Account: \_\_\_\_\_

### PERSONAL INFORMATION

First Name \_\_\_\_\_ M.I. \_\_\_\_\_ Last Name \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ ZIP \_\_\_\_\_

Email \_\_\_\_\_ Daytime Phone Number \_\_\_\_\_

Signature \_\_\_\_\_ Date \_\_\_\_\_

Staple a voided check or deposit ticket to this form from your new Dedham Savings account.  
For Social Security benefits, call 800.772.1213.

## AUTOMATIC WITHDRAWAL SWITCH FORM

To Whom It May Concern:

I have recently opened a new account with Dedham Savings and need to update my automatic withdrawal information. Please begin withdrawing my payment from my new Dedham Savings bank account.

### COMPANY INFORMATION

Company Name

Phone Number

Company Address

City

State

ZIP

### ACCOUNT INFORMATION

Bank: **Dedham Savings**

Bank Routing Number: **211371722**

Account Number: \_\_\_\_\_

Account Type:  Checking

Savings

Money Market

Name on Account: \_\_\_\_\_

### PERSONAL INFORMATION

First Name

M.I.

Last Name

Address

City

State

ZIP

Email

Daytime Phone Number

Signature

Date

Staple a voided check or deposit ticket to this form from your new Dedham Savings account.

## ACCOUNT CLOSING REQUEST FORM

This notice serves as a request and authorization to close my account effective immediately as designated below.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

### ACCOUNT INFORMATION

Bank Name: \_\_\_\_\_

Account Type:  Checking  Savings  Money Market

Account Number: \_\_\_\_\_

### SEND CHECK TO:

First Name M.I. Last Name

Address City State ZIP

Daytime Phone Number