

Switch Kit Information

Switching your checking account to Northern Bank & Trust Company is as simple as 1, 2, 3, 4. Our Switch Kit provides you with all the forms to complete in just a few minutes. All you have to do is bring them into any one of our conveniently located branches, meet with one of our customer service representatives and you will be ready to open your new checking account. Just follow the instructions below. If you have any questions call us at 1-781-937-5400 and we will be happy to assist you.

Step 1

Stop by any Northern Bank & Trust Company branch listed below and fill out the account opening form with one of our customer service representatives. With your new account number you can quickly and easily complete steps 2, 3, and 4!

Convenient locations throughout Woburn, Melrose, Burlington, Billerica, Chelmsford, Westford, Littleton, and Acton.

Step 2

Fill out the Automatic Payment Change Letter and forward this form to any companies that are currently processing recurring automatic payments out of your old bank account. It is important that you switch them to your new Northern Bank & Trust Company account so the billing companies do not try to process payments from your old account once it is closed.

Step 3

Fill out the Account Closing Letter (make a copy) and give it to your current bank to ensure they close your old account and forward any remaining funds to you. Make sure all your checks have *cleared* and that all *automatic payments are stopped*.

Step 4

Use our Direct Deposit Request form to switch your direct deposit to your new Northern Bank account. Fill out the form with your new Northern Bank account number and ABA routing number (our customer service representative can tell you what it is if you do not know). Once completed return the Direct Deposit form to your payroll department in time before the next pay cycle.

That's it! You will be all set-up with your new Northern Bank & Trust Company account!



Northern Bank & Trust Company

Neighbors you can bank on.

781-937-5400

Customer is responsible for filling out forms to ensure processing of your automatic payment switch to Northern Bank & Trust Company and closure of old bank account.

Member FDIC
Equal Housing Lender

Automatic Payment Change Letter

For switching automatic payments to your new Northern Bank account

To change an automatic payment to your new Northern Bank checking account, use this letter to notify any company that is processing a recurring automatic payment for you. If you have more than one automatic payment that you want to deduct from your new checking account, just make copies of this letter and send to each company. Be sure to provide your old bank account number, old bank ABA routing number (the nine digit number on the bottom left of your old check) and your new Northern Bank account number and ABA routing number in the spaces provided. Also, if the billing company has assigned you an account number for the product and services they provide make sure you enter that in space provided as well.

Date _____

To (Company Name) _____

Street Address _____

City _____ **State** _____ **Zip** _____

From (Your Name) _____

Subject: Request to change Automatic Payment for Account # _____

Please be advised that I've recently changed banks and will need to have my automatic payment switched from my old account to my new account with Northern Bank & Trust Company.

OLD AUTOMATIC PAYMENT INFORMATION

I currently have my automatic payment coming out of my (Please circle one account type):

Checking **Savings** **Money Market Account**

Bank Name _____

Bank Account Number _____

ABA Routing Number _____

NEW AUTOMATIC PAYMENT INFORMATION

Please change the automatic payment to the bank and account below (circle one):

Checking Savings Money Market Account

**Northern Bank & Trust Company
215 Lexington St.
Woburn, MA 01801**

Bank Account Number _____

ABA Routing Number 011303097

If you have any questions or need additional information, please contact me at (phone number) _____.

I hereby authorize the changes listed above. _____
Account Owner's Signature



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Account Closing Letter

Date _____

To (Bank Name) _____

Street Address _____

City _____ State _____ Zip _____

From (Your Name) _____

Subject: Request to close account(s)

I am writing to request that you close my account(s) listed below. Please send me /us a check for any remaining funds in the account(s) to the address listed below. If you have any questions, please contact me/us at the phone number listed below. Thank you.

Account(s) to be closed

Account Number(s)	Account Type (please circle one)
1. _____	Checking Savings Money Market Account
2. _____	Checking Savings Money Market Account
3. _____	Checking Savings Money Market Account

Account owner Information and Authorization

Account Owner Name _____

Street Address _____

City _____ State _____ Zip _____

Phone _____

I hereby authorize the closing of the account(s) listed above: _____
Signature



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Direct Deposit Request Form

Use this letter to provide your employer with your new payroll direct deposit information.

To: Company Name _____

From: Employee's Name _____

Street Address _____

City _____ State _____ Zip _____

Phone Number _____ Social Security Number _____

Please immediately re-direct my current payroll direct deposit to my new Northern Bank & Trust Company account provided below.

Thank you.

Deposit Instructions

Northern Bank & Trust Company
215 Lexington St.
Woburn, MA 01801
781-937-5400

New Account # _____

Routing # 011303097

Account Type: Checking Savings

Amount to Deposit: \$ _____ \$ _____

Full Amount to checking Full amount to savings

I hereby request to have my direct deposit sent to my new Northern Bank account listed above.

Signature _____ Date _____



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