



Personal Banking

Switch Kit

First Western Bank offers a wide variety of personal and business banking products and services.

Use this list to find the right options for you!

- Online & Mobile Banking
- Personal Loans
- Health Savings Accounts (HSAs)
- Mortgage & Home Equity Loans
- Construction Loans
- Individual Retirement Accounts (IRA)
- Lines of Credit
- Certificates of Deposit (CD)
- Safe Deposit Boxes



Switch to First Western in 5 Steps

The following forms have been created for you to help make the process of switching your personal bank account(s) easier.

*Important: Make sure to keep this sensitive account information secure. If printed, consider shredding upon completion. Additionally, exercise caution when transmitting documentation via email.



Open your New First Western Bank Account

Open a new account at any First Western location or open an account online on our First Western Bank website.



Get Organized

Use our switch kit to organize the transactions that will be switched to your new First Western Bank account.



Transfer your Direct Deposits

Send Form 1: Direct Deposit Authorization Form to your employer and other sources so your funds can be automatically deposited to your account. If you have Direct Deposits going elsewhere, you can also use this form to switch them to your new account.



Move your Automatic Payments

Send Form 2: Automatic Payment Authorization Form to each of your creditors to switch any automatic payments so they'll come out of your new First Western Bank account.



Close your Old Account

Use Form 3: Account Closing Letter to notify your previous financial institution to close your account and let them know how to disburse any of your remaining funds.

Make sure all direct deposits are switched successfully to your new First Western Bank account(s) before closing your old account. Switches may take up to 60 days.

Note: First Western Bank cannot guarantee that these forms will be accepted in every instance. Your previous financial institution and/or your service partners may require you to make any of these requests in person or by another method other than mail. They may also require more or different information than is contained on the forms provided.

Questions?

- Visit your local First Western Bank location.
- Call us at 1-800-688-2584 to speak with one of our First Western team members.

Open Your New First Western Bank Account

Open a new account at any First Western location, by visiting www.firstwestern.bank/openanywhere, or scan the QR code to the right to get started.



Get Organized: Transaction Checklists

Gather your most recent statements from your old financial institution. If applicable, include statements/information for utility payments, loans, gym memberships, etc., that you have set up with your old account.

Direct Deposits: List all direct deposits to your account(s).

Deposit Type Employer	Company/Institution Name	Account Number	Amount	Date
Payroll				
Social Security				
Pension/Retirement				
Investment/Brokerage				

Automatic Payments/Transfers: List all withdrawals from your account(s).

Withdrawal Type	Company/Institution Name	Account Number	Amount	Date
Home/Auto Insurance				
Life Insurance				
Gas/Electric				
Phone				
Water				
TV/Internet				
Mortgage				

Former Account Activity Tracking

Keep track of the activity on your old account. Make sure that all checks, deposits, automatic payments, debit card transactions, and ATM withdrawals have cleared before closing the account.

Form 1: Direct Deposit Authorization

To transfer your direct deposit, send Form 1: Direct Deposit Authorization Form to your employer and any other sources so your funds can be automatically deposited to your First Western Bank account.

Please contact your employer's payroll department if you have questions about their process.

For Social Security deposits, please call the Social Security Administration at (800) 333-1795 or sign up online at ssa.gov/deposit.



Attention: (Enter the company you want deposits directed from)

Name

Address

City

State

Zip Code

From: (Enter your personal information here)

Customer Name

Customer Address

City

State

Zip Code

Social Security Number (If required)

Phone #

To Whom It May Concern,

I have recently switched financial institutions. Please stop making deposits into my old account and begin making them to my new First Western Bank account indicated below.

New Account Information: (Enter your First Western Bank information here)

First Western Bank Routing Number

091310440

Account Number

☐ Checking ☐ Savings

Account Number

☐ Checking ☐ Savings

Signature

☐ Date

Deposit: ☐ Total Amount ☐ \$

into Checking account listed above

Deposit: ☐ Total Amount ☐ \$

into Savings account listed above

Form 2: Automatic Payment Authorization

Use Form 2: Automatic Payment Authorization Form to request the transfer of your automatic payment(s) to your First Western Bank account, or to establish a new automatic payment from your new First Western Bank account.

Please allow sufficient time for your first payments to be activated. A voided check may be required.

Attention: (Enter the company you want payments directed to)

Name

Address

City

State

Zip Code

From: (Enter your personal information here)

Customer Name

Account Number

Customer Address

City

State

Zip Code

Phone Number

To Whom It May Concern,

I have recently switched financial institutions. Please redirect my automatic payments from my old account and begin withdrawing from my new First Western Bank account indicated below.

Effective: ☐ Immediately ☐ Beginning ___ / ___ / ___

Pay: ☐ Total Amount ☐ \$

New Account Information: (Enter your First Western Bank information below)

First Western Bank Routing Number

091310440

Account Number

☐ Checking ☐ Savings

Signature

Date

Form 3: Account Closing Letter

Use Form 3: Account Closing Letter to request your previous financial institution close your account(s) and give directions on how to disburse any of your remaining funds. Prior to closing those accounts, ask them if there are any fees associated with closing them. Make sure all of your checks and debits have cleared BEFORE you close your old account.

Attention: (Enter financial institution where closing account)

Name

Address

City

State

Zip Code

To Whom It May Concern,

Please accept this letter as authorization and close my account(s) listed below with your institution. Please issue a cashier's check in my name for the remaining balance(s) along with all accrued interest (if applicable).

Account Type	Account Number	Account Owner Name(s)

Please send all closing balances to: (Enter your personal information here)

Name

Address

City

State

Zip Code

Phone Number

Primary Account Owner Signature

Date

Secondary Account Owner Signature

Date

Thank you for making the switch to First Western Bank!

We look forward to working with you.

