

MAKING THE SWITCH IS EASY

Let Us Help!



Step 1

Open Your Bank First Account

- Choose the business account that fits your needs
- Open your account with Bank First
- Stop using your old account once your new one is active



Step 2

Set Up Your Account Features

- Activate debit cards and order checks
- Register for Bank First Digital Banking
- Download the Bank First goBank app
- Set up alerts & account preferences



Step 3

Update Deposits & Payments

- Set up automatic payments, deposits, and withdrawals
- Provide your new account and routing number to specific contacts, as required



Step 4

Treasury Management

- Explore our business services
- Set up payment processing & merchant services solutions
- Become familiar with our fraud prevention tools



Step 5

Close Your Old Accounts

- Confirm all checks have cleared
- Confirm all automatic payments have been transferred
- Close your old accounts

Switch Kit Check List

Deposits & Payments

- ☐ ACH Services
- ☐ Incoming Deposits
- ☐ Check Deposits
- ☐ Merchant Processing Deposits
- ☐ Other _____

Outgoing Payments

- ☐ Payroll
- ☐ Utilities
- ☐ Rent/Lease/Loan Payments
- ☐ Credit Card Payments
- ☐ Attorney/CPA Payments
- ☐ Tax Payments
- ☐ Supplier Invoices
- ☐ Other _____

My Bank First Account Information

- ☐ Account Number: _____
- ☐ Routing Number: 075901134

Need help? We're happy to assist!

- ☐ Business Services Representative: _____
- ☐ Phone Number: _____
- ☐ Treasury Management: (920) 652-3515



BankFirst

www.bankfirst.com

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EQUAL HOUSING LENDER