

Account
Switch
Kit



Axos Bank™ has everything you need to switch your accounts today. Just follow the simple steps included in this kit to relieve the usual hassle of switching banks.

Changing Bank
Accounts Made Easy

Account Switch Kit

Switching to Axos Bank has never been easier. Our Switch Kit will help you seamlessly transfer existing direct deposits or automatic payments to your new Axos Bank account.

Switch Kit Instructions

Set up your new Axos Bank account in 5 easy steps:

1. Open a new account with Axos Bank
2. List any automated debits (ACH) and or Direct Deposits
3. Redirect Direct Deposits
4. Redirect automatic credits/debits or Bill Payments
5. Close your old bank account(s) once all transactions have cleared

Need assistance?

Call 1-888-502-2967

Switch Kit



Use this form to track the transactions that you are moving to Axos Bank. Gather all information on companies that make electronic withdrawals from your old account or Direct Deposits to your old account.

Direct Deposits/Automatic Deposits:

Company Name	Date Notified of Switch	Estimated Switch Date	Completed
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Automatic Debits / Bill Payments:

Company Name	Date Notified of Switch	Estimated Switch Date	Completed
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>

Bank products and services are offered by Axos Bank. All deposit accounts through Axos Bank brands are FDIC insured through Axos Bank. All deposit accounts of the same ownership and / or vesting held at Axos Bank are combined and insured under the same FDIC Certificate 35546. All deposit accounts through Axos Bank brands are not separately insured by the FDIC from other deposit accounts held with the same ownership and / or vesting at Axos Bank.

Use this form to instruct any income source to redirect recurring deposits to your Axos Bank account.

Direct Deposit Form

Business Name:	TIN:
Address:	
City and State:	Zip Code:

I wish to deposit my direct deposit to my Axos Bank account located at:

4350 La Jolla Village Drive, Suite 100
San Diego, CA 92122

Routing Number for Axos Bank: 122287251

My Axos Bank Account Number:
Account Type:

In signing this form I acknowledge that I am authorizing my payment to be sent to the Bank. I further acknowledge that I am authorizing the fund originator to initiate credit entries and, if necessary, debit entries and adjustments to correct any errors to my Axos Bank account. This authorization shall continue until the fund originator receives written notification from me of its termination and the company and depository has been afforded a reasonable opportunity to act.

Signature:
Date:

Direct Deposit may take up to three pay periods to take effect. It is recommended that you leave your prior account open until all direct deposits and direct debits have been switched to your new Axos Bank account.

Note: Some organizations may require a specific form to initiate a direct deposit. Check with the originator of funds to see if a specific form is required.

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Switch Kit



Use this form to redirect recurring automatic deposits to your Axos Bank account.

Automatic Credits

Company Name:	Company Address:
City and State:	Zip Code:

Please redirect my automatic deposit to my new Axos Bank account. My information is as follows:

Axos Bank Account Number:
Account Type:

Axos Bank
4350 La Jolla Village Drive, Suite 100
San Diego, CA 92122

Routing Number for Axos Bank: 122287251

The switch to Axos Bank should begin:

☐ Immediately ☐ Beginning ____/____/____

If you have any questions please contact me at:

Phone Number:

Signature:	Date:
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Switch Kit



Use this form to redirect recurring debits to your Axos Bank account.

Automatic Credits

Company Name:	Company Address:
City and State:	Zip Code:

I am in need of switching my automatic deposit to my Axos Bank account. My information is as follows:

Axos Bank Account Number:
Account Type:

The information for Axos Bank is as follows:

Axos Bank
4350 La Jolla Village Drive, Suite 100
San Diego, CA 92122

Routing Number for Axos Bank: 122287251

The switch to Axos Bank should begin:

☐ Immediately ☐ Beginning ____/____/____

If you have any questions please contact me at:

Phone Number:

Signature:	Date:
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Use this form to notify your prior financial institution to close out your account.

Request to Close Bank Accounts

Name on Account:	Account Number:
Type of Account:	

Upon receipt of this request please close out my account and send a Cashier's Check/Official Check to the following:

Payable to:	Address:
City and State:	Zip Code:

If multiple accounts:

Name on Account:	Account Number:
Type of Account:	

Upon receipt of this request please close out my account and send a Cashier's Check/Official Check to the following:

Payable to:	Address:
City and State:	Zip Code:

Signature:	Date:
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