



THE EQUITABLE BANK

Welcome to The Equitable Bank

Switching banks may sound overwhelming, but it doesn't have to be.

This guide walks you through the process step-by-step so you can move your accounts with confidence — and our team is here if you need help along the way.

My Equitable Account Information

New Account Number: _____

Equitable Routing Number: 275071259

Equitable Contact Person: _____

Questions? Call customer Service: 414.475.1690 or [stop in at any branch.](#)

Switch Kit Check List

STEP 1



Open Your Accounts

- ☐ Meet with a banker to select the right checking/savings account or enroll online
- ☐ Set up Online & Mobile Banking
- ☐ Order debit card
- ☐ Enroll in eStatements
- ☐ Set up alerts and account notifications

STEP 2



Move Your Direct Deposits

- Use our Direct Deposit Authorization Form to update:
- ☐ Employer payroll
 - ☐ Social Security
 - ☐ Pension or retirement income
 - ☐ Investment income
 - ☐ Other recurring deposits
- Allow 1–2 pay cycles for changes to take effect.

STEP 3



Update Automatic Payments

- Review your previous 60–90 days of statements and update:
- ☐ Utilities (electric, gas, water)
 - ☐ Mortgage/rent
 - ☐ Insurance premiums
 - ☐ Streaming services
 - ☐ Gym membership
 - ☐ Credit card or loan payments
 - ☐ Subscription

STEP 4



Update Debit & Card Payments

- ☐ Online shopping accounts (Amazon, PayPal, etc.)
- ☐ Mobile wallets (Apple Pay, Google Pay)
- ☐ Apps with saved payment information

STEP 5



Monitor Both Accounts

- ☐ Keep your old account open for 30 days
- ☐ Confirm all automic deposits and withdrawals have cleared
- ☐ Ensure Outstanding checks have posted

STEP 6 Close Your Old Account

- ☐ Confirm balance is \$0
- ☐ Submit an account closing request
- ☐ Shred old checks and debit cards