

# SWITCH KIT CHECKLIST



## OFFICE LOCATIONS

**Main – Long Beach**  
302 Pine Ave.  
Long Beach, CA 90802  
(562) 437-0011

**Belmont Shore\***  
4827 E. 2nd St.  
Long Beach, CA 90803  
(562) 621-1430

**Bixby Knolls\***  
4545 California Ave.  
Long Beach, CA 90807  
(562) 984-3600

**Corona del Mar\***  
2421 E. Coast Hwy.  
Corona del Mar, CA 92625  
(949) 723-1804

**Downey\***  
9001 Firestone Blvd.  
Downey, CA 90241  
(562) 334-1836

**East Long Beach**  
3140 E. Anaheim St.  
Long Beach, CA 90804  
(562) 621-1400

**Fullerton\***  
315 N. Harbor Blvd.  
Fullerton, CA 92832  
(714) 578-1945

**Garden Grove\***  
10422 Garden Grove Blvd.  
Garden Grove, CA 92843  
(714) 590-3880

**Huntington Beach\***  
7125 Yorktown Ave.  
Huntington Beach, CA 92648  
(714) 465-3131

**Laguna Hills\***  
24300 Paseo de Valencia  
Laguna Hills, CA 92653  
(949) 340-3150

**Lake Forest\***  
23772 Rockfield Blvd.  
Lake Forest, CA 92630  
(949) 460-7900

**Lakewood\***  
5101 Lakewood Blvd.  
Lakewood, CA 90712  
(562) 602-8378

**Los Altos\***  
2302 Bellflower Blvd.  
Long Beach, CA 90815  
(562) 799-7271

**Memorial Hospital**  
2801 Atlantic Ave.  
Long Beach, CA 90806  
(562) 989-7862

**Newport Beach**  
4695 MacArthur Ct., Ste. 130  
Newport Beach, CA 92660  
(949) 241-8280

**Orange\***  
1220 E. Katella Ave.  
Orange, CA 92867  
(714) 288-8450

**Redondo Beach\***  
1333 S. Pacific Coast Hwy.  
Redondo Beach, CA 90277  
(310) 802-7560

**Rolling Hills Estates\***  
27525 Indian Peak Rd.  
Rolling Hills Estates, CA 90274  
(310) 491-1711

**Rossmoor\***  
12535 Seal Beach Blvd.  
Seal Beach, CA 90740  
(562) 799-2002

**San Clemente\***  
621 N. El Camino Real  
San Clemente, CA 92672  
(949) 373-2470

**San Juan Capistrano\***  
31873 Del Obispo St.  
San Juan Capistrano, CA 92675  
(949) 488-8550

**Santa Ana**  
1750 E. 17th St.  
Santa Ana, CA 92705  
(714) 564-1750

**Santa Barbara**  
33 E. Carrillo St.  
Santa Barbara, CA 93101  
(805) 280-4700

**Torrance\***  
22400 Hawthorne Blvd.  
Torrance, CA 90505  
(310) 265-3200

**Tustin\***  
2691 Park Ave.  
Tustin, CA 92782  
(714) 824-3070

## SPECIALIZED CLIENT SERVICES

**Healthcare Client Services**  
2801 Atlantic Ave.  
Long Beach, CA 90806  
(562) 989-7862

**Home Loan Center**  
12515 Seal Beach Blvd.  
Seal Beach, CA 90740  
(866) 649-3863

**OC Regional Headquarters**  
4695 MacArthur Ct., Ste. 130  
Newport Beach, CA 92660  
(949) 241-8280

**Religious Client Services**  
12535 Seal Beach Blvd.  
Seal Beach, CA 90740  
(562) 344-4070

Extended Friday hours

\*Open Saturdays from 9:00 am to 12:00 pm

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## Switching Made Easy.

Switching your banking relationship to F&M is easy. Once you're part of the family, you'll want to ensure that all of your finances are switched over to F&M Bank. Use our friendly Switch Kit to get started today.

### 1 Use the below grid to organize your automatic payments and withdrawals.

Monthly Expense	Current Payment Method (Bill Pay, Direct Debit Transfer, Check, etc.)	Due Date	New Payment Method with F&M
Mortgage/Rent			
Auto Loan			
Insurance (Auto, Health, Life)			
Utilities (Electricity, Gas)			
Monthly Services (Pest Control, Gardening)			
Mobile Phone			
Credit Cards			
Loans			
Internet			
Membership Dues (Health Clubs, AAA <sup>®</sup> )			
Savings			
Investments			
Other			

## 2 Enroll in the F&M Services That You Need.

- |   |   |
|---|---|
| <input type="checkbox"/> Online Banking | <input type="checkbox"/> Debit/Credit Card Alerts |
| <input type="checkbox"/> eStatements    | <input type="checkbox"/> Digital Wallet           |
| <input type="checkbox"/> Bill Pay       | <input type="checkbox"/> Direct Connect           |
| <input type="checkbox"/> Mobile Banking |   |

## 3 Transfer Your Direct Deposits and Automatic Payments.

Give your employer or your payors your new F&M routing number 122201198 and account number \_\_\_\_\_.

Here's a short list of some common income sources:

- |   |   |
|---|---|
| <input type="checkbox"/> Employer                     | <input type="checkbox"/> Social Security Administration |
| <input type="checkbox"/> Investments                  | <input type="checkbox"/> PayPal®                        |
| <input type="checkbox"/> Rentals                      | <input type="checkbox"/> Venmo®                         |
| <input type="checkbox"/> Retirement and pension funds | <input type="checkbox"/> OfferUp/Upwork®                |

## 4 Close Your Old Bank Accounts.

- Ensure any outstanding checks have been cleared.
- Withdraw any remaining funds from your former bank and deposit into your new F&M account(s).
- Be sure to add any needed joint account holder or beneficiary to your new F&M accounts(s).
- Close your old account(s).
- Destroy any unused checks, deposit slip(s) or debit cards.

## Welcome to the F&M Bank Family!

Questions? Visit your local F&M branch office or contact our Client Care Center at (866) 437-0011 for assistance.

### Hours:

Monday - Friday: 7am - 9pm PT

Saturday: 8am - 9pm PT

Sunday: 8am - 5pm PT

## Banking Made Easy

Card Alerts

Digital Wallet

Mobile Banking

Mobile Check Deposit

P2P Payments<sup>1</sup>

Touch ID<sup>®2</sup>

1. Only available to clients with a personal checking account and a personal online banking profile.

2. Touch ID<sup>®</sup> is a trademark of Apple, Inc. registered in the U.S. and other countries.