

Changing banks

Sit back and leave changing your accounts to us

You can relax and count on our support when you combine your Swiss bank accounts into a banking package at UBS. Read on to see how you can benefit from our help.

We'll save you time

There's no need to waste time on telephone calls. To get you started with closing your old accounts, we'll prepare your correspondence to your previous bank and card companies.

You can rely on us

We'll help you send your new banking details to those making regular transfers to you (e.g. your employer or pension fund). You can also count on our support when it comes to your payments (e.g. to your landlord, health insurer, insurance company, or tax administration), as well as for the transfer of other services, such as mortgages and custody accounts.

This is what we need

To guarantee smooth service when you change banks, please make sure that you bring the following information and documents to your personal consultation:

- Your previous account details
- Your previous card products
- An overview of your regular incoming payments, such as your salary, pension fund- or AHV pensions
- An overview of your regular outgoing payments via direct debits, standing orders, or eBill invoices (rent, health insurance premiums, taxes, etc.)

You'll find a checklist on the reverse of this page to help you to put together all the key information you need when changing banks.

How you benefit from a consolidated banking relationship with UBS:

- Professional financial and investment advice from a single source
- An easier time when you fill out your tax return
- The UBS Personal Financial Assistant helps you monitor your income and expenditure, prepare budgets, and set your savings goals. The more transactions you make via UBS, the more precise the results.
- Free account transfers for holders of a UBS Banking Package
- Card products and payment transactions at an attractive all-inclusive price

We're here for you

Take advantage of our free service and make an appointment for a personal consultation. We look forward to meeting you in person.

For all your questions

🌐 ubs.com/bankchange

🌐 ubs.com/help

📞 UBS Service Line* 0848 848 054

🏠 Find your nearest branch ubs.com/locations

* Standard rate: max. CHF 0.08/min.

Your checklist for changing banks

This checklist will help ensure the smooth transfer of your banking relationship to UBS.

- Make a note of your previous accounts and their corresponding IBAN numbers
- Enter the details of your current credit or prepaid cards
- Note down who sends regular payments to you (e.g. employer, pension fund, AHV)
- Draw up a list of your regular payments by direct debit (LSV+), standing order (DA), or eBill invoice
- Don't forget to change your credit card data if it is stored anywhere (iTunes, etc.)

Your previous accounts

Personal account, savings account or current account	IBAN	In the name of (first name, surname)

Your previous card products

Card provider	Card number	Expiry date	In the name of (first name, surname)

Your regular incoming payments

Employer, pension fund, AHV administration office, etc.	Address (street, house number, postal code, city)	Done by	
		Client	UBS
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Your regular outgoing payments

Payment recipient		Type of payment			Payment details		Done by	
Type	Name / Company	Standing order	Direct debit	eBill invoice	Amount (standing orders only)	Frequency	Client	UBS
<input type="checkbox"/> Health insurer		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Landlord		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Telephone, internet, TV		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Taxes		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> ...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>
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