



Switch Checklist

	Company/ Financial Institution	Contact Information	Account Number	Type of Account	Date Mailed/ Contacted*	Follow-Up Date*	✓
Direct Deposit							
Direct Deposit							
Direct Deposit							
Mortgage/Rent							
Auto Loan/Lease							
Insurance							
Electric							
Water							
Telephone							
Gas							
Cable/Satellite							
Internet Provider							
Investments							
Misc. Membership							
Other:							
Other:							
Other:							
Other:							

NOTES: _____

*Make sure all automatic payments and direct deposit requests have been processed prior to closing your account. This process can take 1-2 months to take effect.

It is best to provide 3 months of statements to assist in switching all automatic payments and direct deposits.