

Switch Kit - Checklist

Direct Deposit To Be Switched:

Direct Deposit Type	Frequency	Amount	Completed
Employer/Payroll			
Social Security (1-800-772-1213)			
Government			
Retirement/Other			

Automatic Withdrawals/Debits To Be Switched:

Withdrawal Type	Frequency	Amount	Completed

Accounts To Be Closed:

Financial Institution	Account Number	Account Type	Completed

Save Money By Consolidating Your Debt!

Options To Explore	Financial Institution	Balance	Rate
Refinance Auto Loans			
Refinance Mortgage/Home Equity			
Transfer High-Rate Credit Cards			
Transfer Certificate of Deposit			
Transfer IRA/Retirement Account			