



LOCAL PEOPLE. LOCAL DECISIONS. LOCAL BANK.

Switch Kit Check List

Use this checklist to help track which direct deposits and automatic payments have been switched!

Direct Deposits						
Deposit Type	Company	Account #	Address / Phone #	Amount	Date	✓
Payroll						
Payroll						
Social Security						
Pension						
Interest Income						
Other						
Other						

Automatic Payments								
Payment Type	Company	Account #	Address / Phone #	Amount	Date	Auto pay ✓	Bill pay ✓	Debit Card ✓
Mortgage / Rent								
Auto Loan								
Personal Loan								
Auto Insurance								
Home Insurance								
Water								
Gas								
Electricity								
Cable/ Satellite								
Internet								
Telephone								
Cell Phone								
Trash Pickup								
Credit Card								
Credit Card								
Other								
Other								