

NEW ACCOUNT CHECKLIST



GET ORGANIZED - STEP 1

DIRECT DEPOSIT TO BE SWITCHED:

| DIRECT DEPOSIT TYPE | FREQUENCY | AMOUNT | COMPLETED |
|-----------------------|-----------|--------|-----------|
| Employer | | | |
| Gov't/Social Security | | | |
| Support | | | |
| Brokerage | | | |
| Other | | | |

| OPTIONS TO EXPLORE | FINANCIAL INSTITUTION | BALANCE | RATE |
|-------------------------------------|-----------------------|---------|------|
| Checking Account with Debit Rewards | | | |
| Refinance Auto Loans | | | |
| Refinance Mortgage / Home Equity | | | |
| Transfer High-Rate Credit Cards | | | |
| Transfer Certificate of Deposit | | | |
| Transfer IRA / Retirement Account | | | |

AUTOMATIC WITHDRAWALS/DEBITS TO BE SWITCHED:

| WITHDRAWAL TYPE | FREQUENCY | AMOUNT | COMPLETED |
|-----------------|-----------|--------|-----------|
| Mortgage | | | |
| Auto Loan | | | |
| Insurance | | | |
| Utilities | | | |
| Internet | | | |
| Other | | | |

ACCOUNTS TO BE CLOSED:

| ACCOUNT NUMBER | BANK NAME / ACCOUNT NUMBER | COMPLETED |
|----------------|----------------------------|-----------|
| | | |
| | | |
| | | |



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