

# Switch Checklist

Use this checklist to quickly identify all merchants who currently have access to your account.

## Automatic Deposits

**PAYROLL**

Contact the HR Department where you work. Please include a voided check.

Date \_\_\_\_\_

**SOCIAL SECURITY**

Contact the Social Security Administration at 800-772-1213.

Date \_\_\_\_\_

**TRANSFERS FROM OTHER BANK ACCOUNTS**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**OTHER**

Date \_\_\_\_\_

## Utilities Automatic Payment

**PHONE SERVICE**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**INTERNET SERVICE**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**CABLE OR SATELLITE TV**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**STREAMING SERVICES**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**GARBAGE**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**GAS**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**ELECTRIC**

Account No. \_\_\_\_\_

Effective Date of Change \_\_\_\_\_

**WATER/SEWER**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**OTHER**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**OTHER**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

## Other Payments

**LOANS** (e.g. car, home equity, student loan, credit card)

Account No. \_\_\_\_\_

Date \_\_\_\_\_

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**MORTGAGE**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**ACCOUNT TRANSFERS TO OTHER BANK ACCOUNTS**

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**INSURANCE** (e.g. life, health, auto, home)

Account No. \_\_\_\_\_

Date \_\_\_\_\_

Account No. \_\_\_\_\_

Date \_\_\_\_\_

**BROKERAGE – AUTOMATIC INVESTMENTS**

Date \_\_\_\_\_

**OTHER**

Date \_\_\_\_\_

**OTHER**

Date \_\_\_\_\_

