

NAVIGATION

ACCOUNT CHANGE CHECKLIST

Set up automatic deposits in your new account first. Then switch over payments one at a time, keeping track with this list.

FOR EACH TRANSACTION YOU SWITCH, MAKE A NOTE OF:

ACCOUNT #:

PAYMENT AMOUNT:

DATE/NAME CONTACTED:

DEPOSITS

- paycheck
- government benefits
- tax refund
- other

PAYMENTS

- mortgage
- line of credit
- home phone
- cellphone
- cable
- Internet
- heating
- electricity
- water
- parking
- memberships
- bank credit card(s)
- store credit card(s)
- charity contributions
- safety deposit box
- other

INSURANCE

- home
- car
- life
- other

LOANS

- car
- other