

# Switch Kit

A process for making a move!



## First Steps

### FINANCIAL REVIEW

Gather statements from each of your accounts to review for automatic payments and other account needs.

### CREATE A PLAN

Using the *Stay Organized* list below, consider creating a plan to discuss with us as you review account needs.

### OPEN ACCOUNT(S)

Certain accounts may need to be opened sooner than later. Be sure to ask about products and services that are important to you.

### NEW CARDS & CHECKS

One of the easiest things to do is mix up new cards, checks, and accounts. Consider removing old cards and checks to minimize confusion.

## Stay Organized

- ☒ Accounts, debit cards, and checks are ready to go
- ☒ Balance notifications at both banks are set-up
- ☒ Automatic payment needs have been listed
- ☒ Direct deposits have been updated with my employer
- ☒ Credit card payments have been updated
- ☒ Gas, electric, sewer, water, and trash have been updated
- ☒ Phone, internet, and cable have been updated
- ☒ Mortgage, personal, car, and student loans have been updated
- ☒ Bill pay, online banking, and mobile app has been updated and set-up
- ☒ Monitor outstanding debits for a few weeks
- ☒ Close old accounts that are no longer needed

## Write it Down

Review your current account statements and capture automatic debits for each account. Jot down additional notes to review. (Next Page)

## Contact us!

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 976 SOUTH SHANNON STREET

VAN WERT, OHIO 45891





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## Write it Down

NAME	Account #	Contact Info

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## Notes/Questions

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