

ClickSWITCH

Account Switch Checklist



DIRECT DEPOSIT

- Paycheck(s)
- Investment Income
- Retirement/Pension
- Social Security

UTILITIES

- Electric
- Gas
- Water
- Phone
- Property Tax
- Other Utility #1

- Other Utility #2

ENTERTAINMENT

- Cable/Satellite/Internet
- Gym/Health Membership
- Spotify
- Netflix
- Disney+
- YouTube TV
- Amazon Prime
- Entertainment #1

- Entertainment #2

- Entertainment #3

- Entertainment #4

INSURANCE

- Home/Rental Insurance
- Car Insurance
- Health Insurance
- Phone Insurance

LOAN/DEBT

- Home Loan/Rent
- Car Loan
- School Loan
- Credit Card(s)
- Other Loan #1

- Other Loan #2

- Credit Card #1

- Credit Card #2

- Credit Card #3

MISCELLANEOUS

- _____
- _____
- _____
- _____
- _____