

Bank Change Checklist

Changing banks? Consider the following direct deposits and automatic payments that may need to be changed so you don't miss a payment...

Deposits

- Direct Deposit
- Social Security

Insurance Premiums

- Homeowners/Renters
- Life
- Disability
- Auto
- Umbrella
- Long Term Care

Home

- Mortgage / Rent

Creditors / Loans

- Credit Card(s)
- Auto Loan(s)
- Personal Loan(s)
- Student Loan(s)

Utilities

- Water
- Gas
- Electric
- Waste Removal
- Internet
- Cable
- Telephone

Cash & Investments

- Transfers to/from Investment Accounts
- Transfers to/from Checking Accounts
- 3rd Party Payment Accounts (*Venmo, PayPal, Cashapp*)

Lifestyle

- Gym Membership
- Music Subscriptions
- Streaming Services
- Subscription Boxes
- Publications

(Examples = Amazon Prime, Apple Music, Apple TV, Audible, Bark Box, Book of the Month, Chewy, ClassPass, Dollar Shave Club, Disney+, Hello Fresh, Hulu, Lovevery, New York Times, Paramount+, Peloton, Stitch Fix, Wall Street Journal)