

BANKING WEALTH INSURANCE

SWITCH SERVICES

for checking accounts

Switching service providers, especially for something as ingrained in your daily life as a checking account, can seem like a hassle. At Johnson Bank, we don't want that notion to make you feel "stuck" where you are, which is why we go out of our way to make opening a new checking account and closing your old one as simple and easy for you as possible.

» We'll help you

- · Open your new account
- Switch direct deposits and automatic payments to your new account
- Close your old account
- · Learn the features and benefits of your new account

» All you need to do is

- Provide information on any accounts and automatic payments tied to your old checking account
- Provide authorizations to other financial institutions and companies where your automatic payments are set up
- · Determine what accounts you want to transfer, including:

Checking	ATM/Debit Card
Online Banking	Credit Card
Certificate of Deposit	IRA
Savings/Money Market	Safe Deposit Box

» Closing your accounts

Before closing your account(s), review the list below to make sure the following have been completed:

- All checks have cleared your old account and your old checks have been destroyed
- All debit card/ATM transactions have cleared and your cards have been destroyed
- All automatic payments have been changed to your new account at Johnson Bank (use the checklist provided to help you identify what to change)
- Confirm all direct deposits have been changed to your new account at Johnson Bank

SWITCH SERVICE CHECKLIST

Use these checklists to help you identify the information you may need to switch your accounts.

AUTOMATIC PAYMENTS/TRANSFERS

Homeowners	INSU	INSURANCE						
UTILITIES Gas		Homeowners		Auto				
Gas		Health		Renters				
□ Water □ Telephone □ Oil □ TV/Cable CREDIT CARDS □ Installment Loans □ Visa □ MasterCard □ Amercian Express □ Other INVESTMENTS □ Setirement Accounts □ 529 Plan □ Retirement Accounts □ 1nternet Services □ Cell Phone □ Internet Services □ Newspaper □ Club Memberships DIRECT DEPOSITS INCOME □ Payroll □ Pension □ Social Security □ Disability □ VA INVESTMENTS, DIVIDENDS & INTEREST □ Mutual Funds □ Annuities □ Stocks □ Mutual Funds □ Annuities □ Stocks □ Bonds	UTIL	UTILITIES						
□ Oil □ TV/Cable LOANS □ Mortgage □ Auto Loans □ Equity Loan/Line □ Installment Loans □ Student Loans CREDIT CARDS □ Visa □ MasterCard □ Amercian Express □ Other INVESTMENTS □ Retirement Accounts □ 529 Plan □ Brokerage Accounts □ Cell Phone □ Internet Services □ Newspaper □ Club Memberships DIRECT DEPOSITS INCOME □ Payroll □ Pension □ Social Security □ Disability □ VA INVESTMENTS, DIVIDENDS & INTEREST □ Mutual Funds □ Annuities □ Stocks □ Bonds		Gas		Electric				
LOANS Mortgage		Water		Telephone				
Mortgage		Oil		TV/Cable				
□ Equity Loan/Line □ Installment Loans CREDIT CARDS □ Visa □ MasterCard □ Amercian Express □ Other INVESTMENTS □ Retirement Accounts □ 529 Plan □ Brokerage Accounts □ Internet Services □ Cell Phone □ Internet Services □ Newspaper □ Club Memberships DIRECT DEPOSITS INCOME □ Payroll □ Pension □ Social Security □ Disability □ VA INVESTMENTS, DIVIDENDS & INTEREST □ Mutual Funds □ Annuities □ Stocks □ Bonds	LOANS							
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Brokerage Accounts OTHER WITHDRAWALS Cell Phone	INVESTMENTS							
OTHER WITHDRAWALS Cell Phone		Retirement Accounts		529 Plan				
□ Cell Phone □ Internet Services □ Newspaper □ Club Memberships DIRECT DEPOSITS INCOME □ Payroll □ Pension □ Social Security □ Disability □ VA INVESTMENTS, DIVIDENDS & INTEREST □ Mutual Funds □ Annuities □ Stocks □ Bonds		Brokerage Accounts						
□ Newspaper □ Club Memberships DIRECT DEPOSITS INCOME □ Payroll □ Pension □ Social Security □ Disability □ VA INVESTMENTS, DIVIDENDS & INTEREST Mutual Funds □ Annuities □ Stocks □ Bonds	OTHER WITHDRAWALS							
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INCOME ☐ Payroll ☐ Pension ☐ Social Security ☐ Disability ☐ VA INVESTMENTS, DIVIDENDS & INTEREST ☐ Mutual Funds ☐ Annuities ☐ Stocks ☐ Bonds		Newspaper		Club Memberships				
INCOME ☐ Payroll ☐ Pension ☐ Social Security ☐ Disability ☐ VA INVESTMENTS, DIVIDENDS & INTEREST ☐ Mutual Funds ☐ Annuities ☐ Stocks ☐ Bonds		LCT DEDOCITE						
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 □ VA INVESTMENTS, DIVIDENDS & INTEREST □ Mutual Funds □ Annuities □ Stocks □ Bonds 	_	•						
INVESTMENTS, DIVIDENDS & INTEREST ☐ Mutual Funds ☐ Annuities ☐ Stocks ☐ Bonds				Disability				
☐ Mutual Funds☐ Stocks☐ Bonds		VA						
□ Stocks □ Bonds	INVESTMENTS, DIVIDENDS & INTEREST							
☐ Savings ☐ Money Markets								
☐ Certificates of Denosit		· ·	_	Money Markets				

