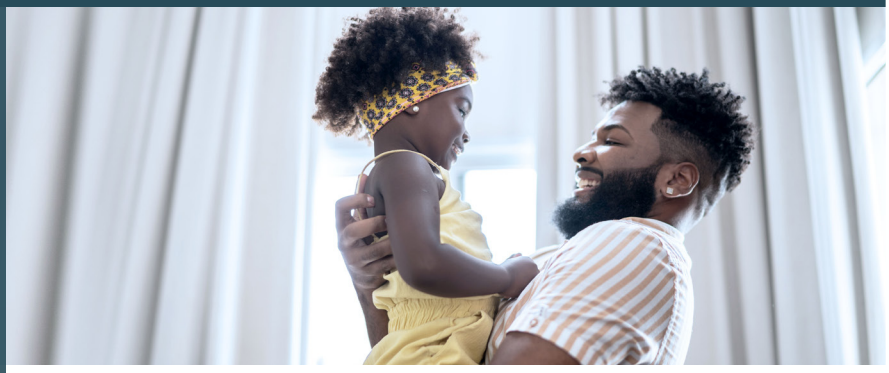
Switch Services for Checking Accounts



Switching service providers, especially for something as ingrained in your daily life as a checking account, can seem like a hassle. We want 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 get started

- 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*
  - *Mobile Banking*
  - *Certificate of Deposit*
  - *Debit Card*
  - *Credit Card*
  - *IRA*
  - *Safe Deposit Box*
  - *Savings & Money Market*

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 (use the checklist provided to help you identify what to change)
- Confirm all direct deposits have been changed to your new account

Switch Service Checklist

Automatic Payments/Transfers

Insurance

- ☐ Homeowners
- ☐ Auto
- ☐ Health
- ☐ Renters

Utilities

- ☐ Gas
- ☐ Electric
- ☐ Water
- ☐ Telephone
- ☐ 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

Other Withdrawals

- ☐ Cell Phone
- ☐ Internet Services
- ☐ Newspaper
- ☐ Club Memberships

Direct Deposits

Income

- ☐ Payroll
- ☐ Pension
- ☐ Social Security
- ☐ Disability
- ☐ VA

Investments, Dividends & Interest

- ☐ Mutual Funds
- ☐ Annuities
- ☐ Stocks
- ☐ Bonds
- ☐ Savings
- ☐ Money Markets
- ☐ Certificates Of Deposit

Let's start a conversation

For additional information, please contact your Johnson Financial Group Advisor or visit **JohnsonFinancialGroup.com**.

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