

Get Organized

Step 1

Accounts To Be Closed:

Account Number	Bank Name/	Account Name	Completed

Direct Deposit To Be Switched:

Direct Deposit Type	Frequency	Amount	Completed
Employer			
Gov't/Social Security			
Support			
Brokerage			
Other			

Automatic Withdrawals/Debits To Be Switched:

Withdrawal Type	Frequency	Amount	Completed
Mortgage			
Auto Loan			
Insurance			
Utilities			
Internet			
Other			

Everything You Need Is Right Here! Consolidate Today.

Other Options to Explore	Financial Institution	Balance	Rate
Refinance Auto Loan(s)			
Refinance Mortgage/Home Equity			
Transfer High-Rate Credit Cards			
Transfer Certificated of Deposit			
Transfer IRA/Retirement Account			

