

Welcome to Catholic Federal!

## Account Switch Checklist

### Get Organized

### Step 1

#### Direct Deposit To Be Switched:

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

#### Everything You Need Is Right Here! Consolidate Today.

Options To Explore	Financial Institution	Balance	Rate
Open Personal Checking Account with Debit Rewards			
Refinance Auto Loans			
Refinance Mortgage/Home Equity			
Transfer High-Rate Credit Cards			
Transfer Certificate of Deposit			
Transfer IRA/Retirement Account			

#### Automatic Withdrawals/Debits To Be Switched:

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

#### Accounts To Be Closed:

Account Number	Bank Name / Account Number	Completed

