



CITIZENS SAVINGS BANK

Account Switch Checklist

This checklist will help you through each step of the process. Referencing your previous bank statements will help you complete the process.

Transfer Direct Deposit

Complete the Direct Deposit Authorization Change form and mail to the company that is automatically depositing into your existing account. Track this step by listing the companies below:

Company:	Date Mailed:	Date Confirmed:

Transfer Automatic Payments

Complete the Automatic Payment Authorization Change form and mail to the company that is automatically deducting from your existing account. Track this step by listing the companies below:

Company:	Date Mailed:	Date Confirmed:

Notification of Account Closure

Once your direct deposits and/or automatic payments start coming into your new account and you know all of your checks have cleared, complete and mail the Account Closure Authorization form to your previous financial institution(s). Track this step by listing the financial institutions below:

Company:	Date Mailed:	Date Confirmed: