

Simple Switch Customer Assessment

Use this checklist as a guide to help you get organized and make your switch a seamless experience. You may also want to review your past 3-4 banking statements for all bills paid automatically. A First National Bank representative can help you identify automated payments on a statement from your former bank.

Automated / Preauthorized Bill Payments

Mark how you pay the following bills:

HOUSING

Mortgage/Rent Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

UTILITIES

Electricity Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Gas Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Water Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Phone Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Internet Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Cable Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Trash Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Other Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

TAXES

Property/school Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Federal Income Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

State Income Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

INSURANCE

Home/renters Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Car Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Life Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Health Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

DEBT

Credit Card Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Student Loan Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Car Loan Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

HELOC/Loan Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Other Auto Payments Online Bill Pay Debit Card/Credit Card Check NA

Automated Transfers / Investments / Linked Accounts

Remember to update transfers to these types of accounts too:

Savings IRA Investment Accounts Other