



EZ Switch Checklist

This checklist will help you through each step of the process. For your convenience, please bring a copy of your previous bank statement. This will help to complete this process.

Transfer Direct Deposit

Simply complete the Direct Deposit Change Notice and print out 2 copies. Mail one to each company that is automatically depositing into your existing account and keep one for your records. Track this step by listing the companies below:

Company:	Date Mailed:	Date Confirmed:

Transfer Automatic Payments to Lincoln National Bank

Simply complete the Automatic Payment Change Notice and print out 2 copies. Mail one to each company that is automatically deducting from your existing account and keep one for your records. Track this step by listing the companies below:

Company:	Date Mailed:	Date Confirmed:

Close Your Old Accounts

Once your direct deposit and/or automatic payments start coming into your new Lincoln National Bank account AND you know all of your checks have cleared your old account, complete and mail the Checking Account Closure Notice to your previous financial institution (s). Track this step by listing the financial institutions below:

Financial Institution:	Date Mailed:	Date Confirmed:

Helpful Hints

Automatic Deposits

These are recurring payments automatically deposited into your account on a regular basis. Examples are payroll, social security, alimony, dividend or disability payments.

Automatic Payments

These are recurring payments automatically withdrawn from your account on a regular basis. Examples include mortgage payments, gym membership fees and insurance premiums.

Contact each company

Find out the address of the main accounting office where you should send the notice of change. Some companies have this information available on their website or billing statements. Make sure no other forms are required.

ABA Routing Number

This is the first group of nine (9) numbers found at the bottom of a check.