

NEW ACCOUNT CHECK LIST

Our checklist makes it simple and stress-free to make the switch to your new checking account.

Account Number:

Routing Number:

074900657

IMPORTANT CONTACT INFORMATION

My Banker's Name:

Phone Number:

Email Address:

Customer Service Phone Number:

1.800.205.3464

Telephone Banking Phone Number:

1.800.473.5055

SET UP YOUR NEW ACCOUNT

- Deposit funds into new account
- Enroll in Online Banking:
Username _____
- Add a bill pay (need payee names, addresses & account #s)
- Enroll in eStatements
- Set up Overdraft Protection
Linked to account: _____
- Enroll in Gold Standard Rewards™
goldstandardrewards.com
- Complete direct deposit form
- Close previous checking accounts
 - Stop automatic payments (e.g. PayPal, Amazon, other):

 - Change direct deposits (e.g. paycheck, Social Security, other):

- Verify transactions have cleared

SET UP ADDITIONAL ACCESS

- Activate debit card
- Download mobile app to your device
- Download MoneyPass app
- Setup Apple Pay or Samsung Pay
- Order checks

ADDITIONAL RECOMMENDATIONS

- Schedule deposit account review
Appt. time: _____
- Schedule loan account review
Appt. time: _____
- Schedule investment account review
Appt. time: _____
- Set up Personal Finance Manager in Online Banking
- Rent Safe Deposit Box
- Other _____



**Find Banking
Center Locations:**

FIRSTMERCHANTS.COM/LOCATIONS

QUESTIONS? | CALL 1.800.205.3464
VISIT FIRSTMERCHANTS.COM