

New Account Checklist

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:
800.205.3464

Telephone Banking Phone Number:
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 and account numbers)

☐ Enroll in eStatements

☐ Set up overdraft protection

Linked to account: _____

☐ Complete direct deposit form

☐ Close previous checking accounts

☐ Stop automatic payments (e.g. PayPal, Amazon, other) and set them up in Card Swap:

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

☐ Verify transactions have cleared

☐ Turn on account alerts for extra security.

SET UP ADDITIONAL ACCESS

☐ Activate debit card

☐ Download mobile app to your device

☐ Download MoneyPass app

☐ Set up Apple Pay or Samsung Pay

☐ Order checks

ADDITIONAL RECOMMENDATIONS

☐ Schedule deposit account review

Appointment time: _____

☐ Schedule loan account review

Appointment time: _____

☐ Schedule investment account review

Appointment time: _____

☐ Set up Personal Finance Manager in online banking

☐ Rent safe deposit box

☐ Opt-in to RoundUps to build savings automatically.



First Merchants
Helping you prosper

MEMBER
FDIC

