

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):

 - 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
- 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
- Other: _____

FIND BANKING CENTER LOCATIONS: [FIRSTMERCHANTS.COM/LOCATIONS](https://www.firstmerchants.com/locations)
QUESTIONS? CALL 800.205.3464 OR VISIT [FIRSTMERCHANTS.COM](https://www.firstmerchants.com)