

Account Transfer Checklist



At this point, your old account should be balanced and you have opened your new account with Bank of Jackson Hole. Now, confirm that all of your direct deposits and automatic payments are changed to your new account.

Use this checklist, along with your most recent statement from your old account, to quickly identify all parties that need to be updated with your new account information.

Direct Deposits

- | | |
|---|--|
| <input type="checkbox"/> Government Deposits | <input type="checkbox"/> Other Direct Deposits (interest or dividends) |
| <input type="checkbox"/> Transfers from other bank accounts | <input type="checkbox"/> Child Support or other court-issued deposits |
| <input type="checkbox"/> Other | |

Automatic Utility Payments

- | | |
|---|--|
| <input type="checkbox"/> Electric | <input type="checkbox"/> Gas |
| <input type="checkbox"/> Telephone / Cell Phone | <input type="checkbox"/> Water / Sewer |
| <input type="checkbox"/> Cable / Internet / Satalite TV | <input type="checkbox"/> Other |

Other Payments

- | | |
|--|--|
| <input type="checkbox"/> Automatic Transfers | <input type="checkbox"/> Brokerage - Automatic Investments |
| <input type="checkbox"/> Loans (car, home equity, credit card) | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> Mortgage Payments | <input type="checkbox"/> Safe Deposit Box Payments |
| <input type="checkbox"/> Other Bank to Bank Transfers | <input type="checkbox"/> Other |