

New Account Checklist



Welcome to TopMark Federal Credit Union!

Account Switch Checklist

Get Organized

Step 1

Direct Deposit To Be Switched:

Direct Deposit Type	Frequency	Amount	Completed
Employer			
Gov't/Social Security			
Support			
Brokerage			
Other			

Everything You Need Is Right Here! Consolidate Today.

Options To Explore	Financial Institution	Balance	Rate
Open Personal Checking Account with Debit Rewards			
Refinance Auto Loans			
Refinance Mortgage/Home Equity			
Transfer High-Rate Credit Cards			
Transfer Certificate of Deposit			
Transfer IRA/Retirement Account			

Automatic Withdrawals/Debits To Be Switched:

Withdrawal Type	Frequency	Amount	Completed
Mortgage			
Auto Loan			
Insurance			
Utilities			
Internet			
Other			

Accounts To Be Closed:

Account Number	Bank Name / Account Number	Completed

