

# Switch Kit Transfer Checklist



Use this form to be sure you've accounted for all payments and debits affecting your account.

	Company/Financial Institution	Account Number	Type of Account	Date Contacted	Follow-Up Date	Date Completed
Direct Deposit						
Direct Deposit						
Mortgage						
Auto Loan						
Auto/Home Insurance						
Gas/Electric						
Health Insurance						
Other						
Other						
Other						
Other						

Notes:

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[www.cbccu.org](http://www.cbccu.org)

**Clarkston Office**  
 8055 Ortonville Road  
 Clarkston, MI 48348  
 248-625-2923  
 Fax: 248-625-5199

**Brandon Office**  
 4 South Street  
 Ortonville, MI 48462  
 248-627-9944  
 Fax: 248-627-3873