



Switch Kit Checklist

To make the transition easier switching to Iowa State Bank, keep track of your progress by checking the following accounts off the list below:

New Account

- ☐ Open new Iowa State Bank account(s)
- ☐ Order Iowa State Bank debit card
- ☐ Order checks
- ☐ Set up Online Banking and Bill Pay
- ☐ Download Iowa State Bank Mobile App
- ☐ Enroll in eStatements
- ☐ Enroll in Account Alerts
- ☐ Download Shazam Brella App
- ☐ Add Debit Card to Digital Wallet

Closed Account

- ☐ Discontinue use of old account
- ☐ Transfer direct deposit(s)
- ☐ Create a list of automatic payments
- ☐ Update automatic payments
- ☐ Destroy old checks and debit card
- ☐ Ensure all outstanding checks have cleared
- ☐ Ensure all direct deposits have cleared
- ☐ Contact former financial institution to close old account

Deposit	Company Name	Account Number	✓
Employer/ Payroll			☐
Financial Organizations - Investment Income			☐
Pension/ IPERS			☐
Social Security			☐
Pay Services (Venmo, PayPal, Cash App, Zelle, etc.)			☐
Loans			☐
Mortgage/ Rent			☐
Auto			☐
Tithing			☐
Insurance			☐
Cell Phone			☐
Utilities (gas, water, electricity, etc.)			☐
Cable/ TV Subscriptions			☐
Memberships (Gym, Streaming, etc.)			☐
Internet Services			☐
Other			☐