



## Switch Assist Organizer

Please use this worksheet to help you easily organize and track all of your Direct Deposits, Automatic Payments/Withdrawals, and Online Bill Payments. This tool can assist you through the switching process yourself or bring them in for your local Kitsap Banker to help.

### Payment \_\_\_\_\_

Switch Complete

Company with Account Number

Company with out Account Number

Individual

Payee Name \_\_\_\_\_

Company Account Number \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Direct Deposit

Direct Deposit Date \_\_\_\_\_

Automatic Payment/Withdrawal

Date \_\_\_\_\_ Amount \_\_\_\_\_

Online Bill Payment      Recurring:  Yes  No

If recurring, date \_\_\_\_\_ Amount \_\_\_\_\_

### Payment \_\_\_\_\_

Switch Complete

Company with Account Number

Company with out Account Number

Individual

Payee Name \_\_\_\_\_

Company Account Number \_\_\_\_\_

Address \_\_\_\_\_

Phone Number \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Direct Deposit

Direct Deposit Date \_\_\_\_\_

Automatic Payment/Withdrawal

Date \_\_\_\_\_ Amount \_\_\_\_\_

Online Bill Payment      Recurring:  Yes  No

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City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Direct Deposit

Direct Deposit Date \_\_\_\_\_

Automatic Payment/Withdrawal

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City \_\_\_\_\_

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Direct Deposit

Direct Deposit Date \_\_\_\_\_

Automatic Payment/Withdrawal

Date \_\_\_\_\_ Amount \_\_\_\_\_

Online Bill Payment      Recurring:  Yes  No

If recurring, date \_\_\_\_\_ Amount \_\_\_\_\_