Switch Kit Worksheet

Below is a worksheet that will help you consider all possible transactions that may need to be transferred to your new account at MIDFLORIDA. You can also review your recent statements to identify additional accounts or transactions. Once you've completed the worksheet, you can contact each company on your own, or bring the form to any MIDFLORIDA branch for assistance.

Determine how you will contact these businesses:

- Call the company to make the switch.
  OR
- Log on to the company's website and enter the change request online.
  OR
- Forward a letter to the company to transfer transactions.

Direct Deposits – List the companies that make automatic deposits into your account.

Type	Company Name	Phone #	Account #	Address	Switched Yes/No
Payroll					
Payroll					
Retirement					
Pension					
Investments					
Social Security					
Other					

Reference Contact Information

Social Security Administration:	1-800-772-1213	www.ssa.gov
Office of Personnel Management:	1-888-767-6738	www.opm.gov
U.S. Railroad Retirement Board:	1-800-808-0772	www.rrb.gov
Department of Veterans Affairs:	1-877-838-2778	www.va.gov

Automatic Payments – List any companies that make automatic withdrawals from your account.

Bill Pay – If you are establishing Bill Pay with MIDFLORIDA, list the payments below from your current Bill Pay. This worksheet will assist with setting up your Payees and Payments with MIDFLORIDA. You can also provide the worksheet to any MIDFLORIDA branch and we will set them up for you.

Type	Company Name	Phone #	Account #	Address	Switched Yes/No	Bill Pay Yes/No
Mortgage/Rent						
Auto Loan						
Auto Loan						
Auto Insurance						
Student Loan						
Cable/Satellite						
Cell Phone						
Electric						
Gas						
Water						
Internet						
Telephone						
Health Club						
IRA/Retirement						
Day Care						
Child Support						
Alimony						
Credit Card						

Type	Company Name	Phone #	Account #	Address	Switched Yes/No	Bill Pay Yes/No
Credit Card						
Credit Card						
Loan						
Loan						
Loan						
Other						
Other						