

We're here to help you make the switch to Chase

Use this simple checklist to help guide you.



1. Open your new Chase business checking account

Visit chase.com to find out more about checking account options that might be right for your business, then see what [required documentation](#) you'll need to complete your account opening.

Visit your local Chase branch or apply online to open your new account.



2. Set up your new Chase business checking account

Sign in to Chase Business Online.

Transfer funds into your new account within 60 days to ensure your account remains active.

To manage your Chase business and personal accounts under one sign-in, you can link them by following [these steps](#).

Download the Chase Mobile® app.¹



3. Organize your existing and new account information

Use our [Account Switching Guide](#) to help you organize your account and payments details. You'll refer back to this throughout your transfer.



4. Update any automatic payments

Set up any recurring payments like payroll or utility bills to be withdrawn from your new Chase account. You can use our [Payment Center](#) to set up automatic payments.

Pro tip: You can find your account and routing numbers on the Chase Mobile app by tapping into your account tile and selecting "Show details."



5. Notify your service providers

Use our [ACH and Deposits Change Notification Form](#) to provide your new account information to any vendors, clients or customers who regularly send you money.



6. Visit our [new account website](#) to learn how to use your new account and all the features available.

Keep an eye on your new account to ensure all transactions are processing correctly.

Explore our library of short tutorial videos to help get you started using our popular digital tools and features.

[Visit Helpful Tips](#)

If you need additional assistance, [set up a meeting](#) with a Business Relationship Manager at your local branch.

¹Chase Mobile® app is available for select mobile devices. Message and data rates may apply.

Your Account Switching Guide

Use this personal worksheet to help keep you organized as you switch your account to Chase.

Previous business account

Account number (last 5 digits)	Routing number	Debit card number	Expiration date
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Chase business account

Account number (last 5 digits)	Routing number	Debit card number	Expiration date
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Payments to switch

Company/payee	Next scheduled payment to switch	Amount	Date company/ payee notified	New payment method (online payment, debit card, checking account)
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Merchant services accounts to switch

Payment processor	Date notified	Status
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Payroll accounts to switch

Payroll provider	Date notified	Status
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Outstanding checks to clear

Checks payable to	Amount	Bank check was written from	Date check cleared
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IMPORTANT INFORMATION: This material is for your personal organizational purposes only. Account numbers should always be kept in a secure location.

To:

Company/organization name

City

State

ZIP Code

Account number at company/organization

From:

Business name

Business address

City

State

ZIP Code

To whom it may concern:

Please redirect ACH payments for the above account number to the new bank account as instructed below.

Effective:

Immediately

Beginning

(MM)

(DD)

 (YYY)

New JPMorgan Chase Bank, N.A. account information

New bank routing number

New bank account number

Checking

Savings

Authorizing officer printed name

Signature

Title

Date

If you have questions about this request, please call: ()

Area Code