



# Do it yourself – Everyday and Savings account checklist

Use the white tickboxes  to keep track of your progress. If you need help, please call us on 0800 18 18 18.

Things to consider	What you need to do
<b>1</b> <b>Keep track</b> of your new National Bank account with touchtone phone banking and Online Banking.	<ul style="list-style-type: none"><li>• Register for touchtone phone banking by calling <b>0800 28 28 28</b>.</li><li>• Register for Online Banking at <a href="http://www.nationalbank.co.nz">www.nationalbank.co.nz</a> or visit one of our branches.</li><li>• Have your new National Bank customer number handy when you register for these services.</li></ul> <input type="checkbox"/>
<b>2</b> <b>Regular income</b> Wages/salary, rent, investment income.	<ul style="list-style-type: none"><li>• Advise your regular income providers of your new National Bank account details.</li></ul> <input type="checkbox"/>
<b>3</b> <b>Automatic payments</b> <i>Regular payments of a fixed amount being paid from your account like rent, mortgage, or HP repayments.</i>	<ul style="list-style-type: none"><li>• Ask your old bank for a print out of your automatic payment details – account being paid, amount and frequency of payment.</li><li>• Cancel the automatic payments at your old bank.</li><li>• We can assist you to arrange setting up the same payments from your new National Bank account.</li></ul> <input type="checkbox"/>
<b>4</b> <b>Bill payments</b> <i>Common payee account details are held by all banks – just have a recent bill handy when you phone us.</i>	<ul style="list-style-type: none"><li>• Ask your old bank for the account details of any payees specific to you.</li><li>• Cancel the payees with your old bank.</li><li>• We can assist you to arrange setting up the bill payments from your new National Bank account.</li></ul> <input type="checkbox"/>
<b>5</b> <b>Direct debits</b> <i>These payments are usually regular bills of irregular amounts e.g. insurance premiums, electricity and gas bills.</i>	<ul style="list-style-type: none"><li>• Ask your old bank to print out all direct debits loaded against your account.</li><li>• Cancel the direct debits with your old bank.</li><li>• Advise each company of your new National Bank account details.</li></ul> <input type="checkbox"/>
<b>6</b> <b>Cheques</b>	<ul style="list-style-type: none"><li>• Make sure any cheques you've written from your old account are presented before you close the account.</li></ul> <input type="checkbox"/>
<b>7</b> <b>Finally...</b>	<ul style="list-style-type: none"><li>• Remember to close your old bank account.</li></ul> <input type="checkbox"/>