



## ClickSwitch® Checklist

### Direct Deposits

- Paycheck
- Social Security
- Investment Income
- Retirement/Pension

### Utilities

- Electric
- Gas
- Water
- Sewer
- Internet
- Mobile Phone
- Home Phone
- Cable/Satellite
- Property Tax
- Other Utilities \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

### Insurance

- Home/Rental Insurance
- Car Insurance
- Health Insurance
- Life Insurance
- Phone Insurance

### Loan/Debt

- Home Loan/Rent Car Loan
- School Loan
- Loan #1 \_\_\_\_\_
- Loan #2 \_\_\_\_\_
- Credit Card #1 \_\_\_\_\_
- Credit Card #2 \_\_\_\_\_
- Credit Card #3 \_\_\_\_\_

### Entertainment

- Amazon Prime
- Netflix
- Hulu
- Music Streaming
- Kids Activities
- Gym/Health Club
- Other Streaming #1 \_\_\_\_\_
- Other Streaming #2 \_\_\_\_\_
- Other Streaming #3 \_\_\_\_\_

### Miscellaneous

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

