

PRIMIS BUSINESS SWITCH FORM

Use this worksheet to help get things organized as you switch over to Primis.

This form is for personal purposes only. Please keep account/card details in a secure location.

Primis Business Account

Account # (Last 5 digits)	Routing #
<input type="text"/>	<input type="text"/>
Debit Card #	Exp. Date
<input type="text"/>	<input type="text"/>

Previous Business Account

Account # (Last 5 digits)	Routing #
<input type="text"/>	<input type="text"/>
Debit Card #	Exp. Date
<input type="text"/>	<input type="text"/>

Recurring Payments to Switch

Payee	Amount	Next Scheduled

Merchant Services to Switch

Payment Processor

Outstanding Checks

Check payable to	Amount	Date check written	Date check cleared
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Other Notes: