



AUTOMATIC/RECURRING PAYMENT FORM

It's hard to remember all the different payments we have connected to our checking accounts. This form will help you identify those things and keep track of when you made the updates, finalized the switch, etc.

	Bill	Company / Payee	Acct. #	Amount	Phone or website	Date Contacted	Spoke With	Date Effective
	Mortgage/Rent							
Utilities & Services	Electricity							
	Gas							
	Water							
	Internet							
	Cable							
	Home Phone							
	Mobile Phone(s)							
	Garbage							
	Other #1							
	Other #2							
Loans & Debt	Home Equity							
	Credit Card #1							
	Credit Card #2							
	Credit Card #3							
	Student Loan							
	Auto Loan							
	Other Loan							
Insurance	Home/Renters							
	Auto							
	Life							
	Health							
	Other							
Online & Leisure	Examples: Netflix, Hulu, Amazon Prime, Apple Music®, Venmo, PayPal							
	Streaming #1							
	Streaming #2							
	Payment Svc. #1							
	Payment Svc. #2							
	Gym							
	Other #1							
	Other #2							
Taxes	Property							
	Federal Income							
	State Income							