



EQUITY
Financial Services

Super Simple SWITCHING



You want to switch to Equity FS but it's just too much bother to switch all your accounts, right? Wrong. With **Super Simple Switching** you can easily transfer your existing deposits and PAP's (pre-authorized payments) to your new Equity FS account.

Where do I start?

Download the **Super Simple Switching** package from the website. Gather the following information:

- Your new Equity FS Chequing Account Number
- Bill stubs for all your current pre-authorized payments

Then...

Complete the **Super Simple Switching Checklist**

This will give you a good overview of what transactions need to be switched. Be sure to leave enough cash in your old account to cover outstanding payments that may occur before the switch is official.

Finally,

Send your **Super Simple Switching Forms**

IMPORTANT You will need to supply us with a signed form of authorization for each of your PAP billers and payroll depositors.

Congratulations... you're Switched!

If you have any questions, please contact a friendly Equity FS staff member.



Visit www.equityfs.ca or email us at info@equityfs.ca



STEP 1 *SUPER SIMPLE SWITCHING* Your Switching Checklist



This shows you which transactions need to be switched. Be sure to leave enough money in your old account to cover any outstanding payments that may occur before the switch is official.

Pre-Authorized Payment	Account Number	Payment Amount	Contact Number	Date Called	Completed
Mortgage					
Vehicle Loan					
Other Loan 1					
Other Loan 2					
Insurance • Home					
• Vehicle					
• Other					
Home Phone					
Mobile Phone					
Internet					
Cable					
PayPal					
Natural Gas					
Heating Oil					
Electricity					
Water					
Taxes					
Charitable Contribution					
RRSP Contributions					
Other Savings / Investing Contributions					
Other					
Total					

Visit www.equityfs.ca or email us at info@equityfs.ca



STEP 2 *SUPER SIMPLE SWITCHING* **Your Switching Forms**



You will need to send us a signed form for each of your current PAP billers and send forms to switch any payroll deposits.

To whom it may concern,

Please note the following change to my account information.

My Account Information:

Personal Information:

My Equity Financial Services Account Number

Name

Address

Signature  Date

City, Province, Postal Code

Phone Number

Please Redirect My:

Depositor or Biller:

- Regular Deposits
- Automatic Payments

Name

Address

Effective:

City, Province, Postal Code

- As soon as possible
- Beginning / /

Account Number of Bill or Direct Deposit (if applicable)

This form may not be appropriate for all depositors/billers. Please confirm the details required by each individual biller.

Please attach a VOID cheque from your new Equity Financial Services account here.