



## Better Banking Checklist

### 1. OPEN NEW ACCOUNT

- Open checking / savings
- Set up online & mobile banking
- Turn on alerts / notifications
- Enroll in mobile deposit & e-statement
- Receive checks & debit cards
- Activate debit card (800 290 7893)

Notes \_\_\_\_\_

### 2. MOVE MONEY IN (Deposits)

- Payroll
- Retirement / investments
- Other deposits

Notes \_\_\_\_\_

### 3. MOVE MONEY OUT (Payments)

- Mortgage / rent
- Auto & credit cards
- Utilities & insurance
- Subscriptions
- Update stored cards / apps

Notes \_\_\_\_\_

### 4. MONITOR

- Keep old account 30–60 days
- Verify deposits & payments
- Watch for duplicates

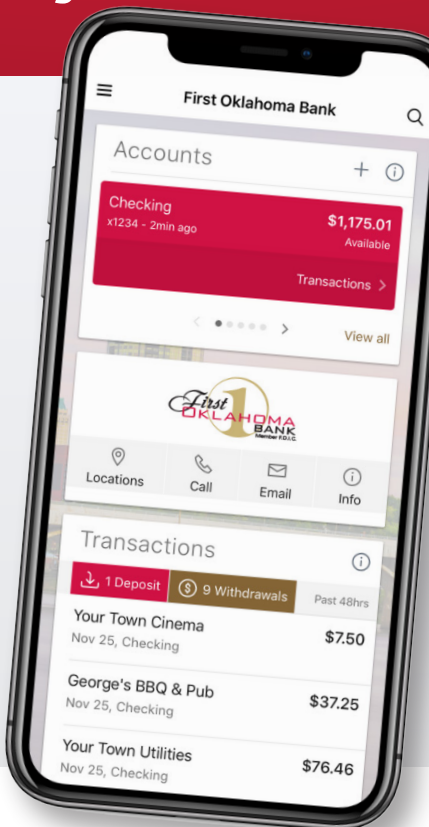
Notes \_\_\_\_\_

### 5. CLOSE OLD ACCOUNT

- Transfer balance
- Close account
- Destroy cards / checks

Notes \_\_\_\_\_

# Mobile Banking *Made Easy*



## Questions or Need Assistance?

918-392-2500 | [customercare@firstoklahomabank.com](mailto:customercare@firstoklahomabank.com)

## PROTECTING YOUR FINANCIAL INFORMATION

To keep your financial information safe, remember that First Oklahoma Bank will never call you and ask for your account number or password. Call us immediately if you suspect something is wrong. 918-392-2500