



Moving Checklist

Our moving checklist will help you be prepared for all sorts of situations. Check out these helpful tips from Univest.

Important Items and Documentation

- Post office - file a USPS address change online or in person
- Driver's license
- Vehicle registration
- Complete Form 8822 with the IRS
- Social Security Administration
 - (if you receive Social Security or Medicare benefits)
- Voter registration
- Wills
- Power of Attorneys
- Medical Power of Attorneys
- Guardianship Documents

Financial and Insurance Services

- Bank
- Loan companies
- Credit card companies, including retail credit cards
- Accountant and tax advisors
- Financial or wealth advisors
- Health insurance
- Dental insurance
- Vision insurance
- Life insurance
- Auto insurance
- Homeowner or renter's insurance

Utilities

- Gas
- Electricity
- Water
- Sewage
- Internet
- Cable Company
- Phone Company

Important People to Contact

- Employer
- Schools
- Doctors
- Dentists
- Lawyers to update Wills, power of attorney documents, medical power of attorneys, and guardianship documents.
- Veterinarian

Retail Services and Organizations

- Retail websites
- Streaming services
- PayPal or Venmo
- Retail clubs like Costco or Sam's Club
- Magazines
- Google Maps and Apple Maps
- Uber, Lyft, and Waze
- Subscription boxes
- Gyms
- Religious institutions

ADDITIONAL ITEMS TO CONSIDER:

Change automatic payment information- Contact vendors to transfer automatic payments (credit cards, loans, utility bills, online shopping sites, gym/health memberships, insurance, etc.) from your old account to your new Univest account. It is important to also transfer automatic payments linked to your account from your debit card.

Discontinue use of your old checking account- Begin using your new Univest account to make deposits and payments. It's important to keep your old account funded until all outstanding checks and automatic payments have cleared. Remember to securely dispose of your remaining inventory of unused checks, deposit slips, and debit cards. This will reduce the risk of accidental use of your old account.

Transfer your Direct Deposit- If you are receiving direct deposit from an employer, social security, or another government entity, you will need to inform your direct deposit initiator that you switched to Univest. Be sure to provide them with the information they need to transfer your direct deposit to your new account.

If you're switching banks remember to update your direct deposit with your employer, contact social security, and update any ACH and automatic bill payments linked to your account.

Univest Financial Corporation