

# MERCHANT ACCOUNT PROTECTION CHECKLIST

## BEFORE YOU SIGN A NEW AGREEMENT



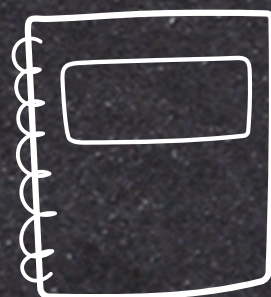
☐ Get the name and contact info of your assigned agent (not just the sales team).

☐ Request a full list of key department contacts: - Customer Service - Tech Support - Risk Department - Cancellation Department

## WHILE YOUR ACCOUNT IS ACTIVE

☐ Keep a list of all provider phone numbers, emails, and extensions in one place.

☐ Understand who to contact for the following issues: - Deposit delays or discrepancies  
- Equipment or terminal support  
- Account holds or partial funding  
- Monthly billing questions



## BEFORE YOU CANCEL



☐ Check your contract for ETF terms and cancellation conditions.

☐ Request confirmation of your ETF in writing from the provider.

☐ If you've already switched providers, place a STOP PAYMENT at your bank to block unexpected ACH withdrawals from the old provider.

☐ Ensure cancellation is submitted in writing and confirmed by the appropriate department.

Need help with any of these steps? Visit our website and book an appointment for free support - no pressure, just clarity

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