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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