



Bank Transfer Kit

530 9th Street West / PO Box 2076, Columbia Falls, MT 59912

www.freedombankmt.com

Voice: (406) 892-1776

Fax: (406) 892-6620

Account Transfer Kit Checklist

Just follow these steps for a quick and painless way to transfer your accounts to Freedom Bank.

1. Have your new Freedom Bank account number(s) ready when completing the authorization forms in the account transfer kit:

Account Number: _____

Routing Number: 092905456

2. Switch direct deposits/automatic deposits using the **Authorization to Change**

Direct Deposit:

- | | |
|---|---|
| <input type="checkbox"/> Employer Deposit | <input type="checkbox"/> Brokerage Deposits |
| <input type="checkbox"/> Government Deposit | <input type="checkbox"/> Court-ordered Deposits |
| <input type="checkbox"/> Social Security Administration | <input type="checkbox"/> Other |

3. Switch automatic payments/withdrawals using the **Authorization to Change Automatic Withdrawal:**

- | | |
|--|---|
| <input type="checkbox"/> Mortgage/Rent | <input type="checkbox"/> Auto |
| <input type="checkbox"/> Association Fees | <input type="checkbox"/> Club/Membership |
| <input type="checkbox"/> Dues Internet Service | <input type="checkbox"/> Cable TV/Satellite |
| <input type="checkbox"/> Investments | <input type="checkbox"/> Credit Cards |
| <input type="checkbox"/> Utilities: Electric, Gas, Water | <input type="checkbox"/> Phone/Cell Phone |
| <input type="checkbox"/> Online Billing | <input type="checkbox"/> Other |

4. Close all other savings, checking & bill payment accounts using the

Authorization to Close Account:

Financial Institutions: _____

5. Additional options to explore:

- Refinance your auto loan at Freedom Bank.
- Refinance your mortgage loan at Freedom Bank.
- Tap your home's equity with a Freedom Bank home equity loan.





Bank Transfer Kit

530 9th Street West / PO Box 2076, Columbia Falls, MT 59912

www.freedombankmt.com

Voice: (406) 892-1776

Fax: (406) 892-6620

Authorization to Change Direct Deposit

Instructions: Complete this authorization to change direct deposits to Freedom Bank and provide your payroll office or other payor who makes automatic deposits to your account.

Date

Employer/Depositor's Name

Address

City/ State/ Zip

To Whom It May Concern:

You are currently making direct deposits on my behalf to this account:

Old Bank: _____

Routing Number: _____

Account Number: _____

Please discontinue direct deposits here and immediately start direct deposits to my account at:

Freedom Bank

PO Box 2076

Columbia Falls, MT 59912

Routing Number: 092905456

Account Number: _____ Savings / Checking (circle one)

If you have any questions about this request, please contact me during the day / evening (circle one) at

(____) _____ (phone number).

Thank you.

Sincerely,

Signature

Name

Address

City/ State/ Zip





Bank Transfer Kit

530 9th Street West / PO Box 2076, Columbia Falls, MT 59912

www.freedombankmt.com

Voice: (406) 892-1776

Fax: (406) 892-6620

Authorization to Change Automatic Withdrawal

Instructions: Complete this authorization to have automatic withdrawals made from your Freedom Bank account. Print one authorization for each company that makes automatic withdrawals from your account. Remember to change any automatic payments made by Visa check card too.

Date

Name of Company That Makes Automatic Withdrawal

Address

City/ State/ Zip

To Whom It May Concern:

You are currently withdrawing \$_____ (amount) on a _____ (when) basis for my _____ (what payment is for) from:

Old Bank: _____

Routing Number: _____

Account Number: _____

or

Card Number: _____

Please discontinue withdrawals from this account and (check one):

Begin withdrawals from my account at:

Freedom Bank

PO Box 2076

Columbia Falls, MT 59912

Routing Number: 092905456

Account Number: _____ Savings / Checking (circle one)

Begin withdrawals from my Freedom Bank Visa Check Card:

Card Number: _____ Expiration: _____ CVV: _____

If you have any questions about this request, please contact me during the day / evening (circle one) at (____) _____ (phone number).

Thank you.

Sincerely,

Signature

Name

Address

City/ State/ Zip





Bank Transfer Kit

530 9th Street West / PO Box 2076, Columbia Falls, MT 59912

www.freedombankmt.com

Voice: (406) 892-1776

Fax: (406) 892-6620

Authorization to Close Account

Instructions: Complete this authorization to close accounts at other financial institutions and have funds transferred to your Freedom Bank account. Print one authorization for each financial institution where you have accounts. Remember to destroy old checks, ATM cards and/or debit cards.

Date

Bank / Other financial institution name

Address

City/ State/ Zip

To Whom It May Concern:

Please close my account(s) with your financial institution:

Account Numbers: _____

Account Holders: _____

ID Verification (SSN or secret account code): _____

And send a check for the remaining balance(s) to my new account at:

Freedom Bank

PO Box 2076

Columbia Falls, MT 59912

Routing Number: 092905456

Account Number: _____ Savings / Checking (circle one)

I have also made arrangements to discontinue the direct deposit and automatic withdrawal of funds from my account(s) with your financial institution.

If you have any questions about this request, please contact me during the day / evening (circle one) at () _____ (phone number).

Thank you.

Sincerely,

Signature

Name

Address

City/ State/ Zip

