

Phone: (406) 892-1776  
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www.freedombankmt.com



530 9<sup>th</sup> St West  
PO Box 2076  
Columbia Falls, MT 59912

**Account Ownership:**  Single Party  Multi-party  UTMA  Representative Payee  Guardian  
 Payable on Death (POD)  
**Account Type:**  Free Checking  Freedom Interest Checking  Eagle 50 Checking  HSA Checking  Freedom Savings  Patriot Savings (Under 18)  IRA Savings  Insured Money Market Savings  Certificate of Deposit  
 Safe Deposit Box

## Personal Account Information

1) Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Mailing Address (City, State, Zip): \_\_\_\_\_  
Physical Address (City, State, Zip): \_\_\_\_\_  
Home Phone Number: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_  
Work Phone Number: \_\_\_\_\_  
City Born In: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Security Question (optional): \_\_\_\_\_ Answer: \_\_\_\_\_  
Current or Previous Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_  
Driver's License Number & State: \_\_\_\_\_  
Email Address: \_\_\_\_\_

2) Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Mailing Address (City, State, Zip): \_\_\_\_\_  
Physical Address (City, State, Zip): \_\_\_\_\_  
Home Phone Number: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_  
Work Phone Number: \_\_\_\_\_  
City Born In: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Security Question (optional): \_\_\_\_\_ Answer: \_\_\_\_\_  
Current or Previous Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_  
Driver's License Number & State: \_\_\_\_\_  
Email Address: \_\_\_\_\_

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**The US Patriot Act requires us to obtain Personal Information as well as Valid Picture Identification.**

Submitted application forms are property of Freedom Bank.

This form will be retained for records whether you account is approved or denied.

**FDIC Insured**

3) Name: \_\_\_\_\_  
Social Security Number: \_\_\_\_\_  
Date of Birth: \_\_\_\_\_  
Mailing Address (City, State, Zip): \_\_\_\_\_  
Physical Address (City, State, Zip): \_\_\_\_\_  
Home Phone Number: \_\_\_\_\_ Cell Phone Number: \_\_\_\_\_  
Work Phone Number: \_\_\_\_\_  
City Born In: \_\_\_\_\_ Mother's Maiden Name: \_\_\_\_\_  
Security Question (optional): \_\_\_\_\_ Answer: \_\_\_\_\_  
Current or Previous Occupation: \_\_\_\_\_ Employer: \_\_\_\_\_  
Driver's License Number & State: \_\_\_\_\_  
Email Address: \_\_\_\_\_

**Standard Overdraft Practices:**

We pay overdrafts at our discretion, which means we do not guarantee that we will always authorize and pay any type of transaction.

I understand the above statement: (all applicants *initial* here) 1) \_\_\_\_\_ 2) \_\_\_\_\_ 3) \_\_\_\_\_

**Questions: (Please answer all)**

- 1) What is the purpose of this account? \_\_\_\_\_
- 2) What type of items do you expect to deposit to account? **PLEASE CIRCLE ALL THAT APPLY:**  
Cash – Checks – Direct deposits - Wire transfers – ACH – Other (please explain)  
\_\_\_\_\_
- 3) Average Monthly Deposits (**please circle**): under \$1,000 --- \$1,000 to \$3,000 --- over \$3,000
- 4) What method do you plan to withdraw funds from the account? **PLEASE CIRCLE ALL THAT APPLY:**  
Cash – Checks – Debit Card – ATM withdrawal – Cashier's Check - Wire transfers – ACH – Other (please explain)  
\_\_\_\_\_
- 5) Average Monthly Withdrawals (**please circle**): under \$1,000 --- \$1,000 to \$3,000 --- over \$3,000
- 6) Will you be doing any transactions outside the U.S.? Yes – No; *if yes*, What country or countries?  
\_\_\_\_\_
- 7) Why did you choose Freedom Bank? \_\_\_\_\_

***PLEASE NOTE: Due to regulations more questions may be required for customer due diligence.***

By completing this application, I acknowledge that Freedom Bank is authorized to access my personal information and in doing so retain my information acquired through ChexSystems and any federal or state government agencies. I understand my application will be subject to approval based on these reports.

1) \_\_\_\_\_  
Signature

2) \_\_\_\_\_  
Signature

3) \_\_\_\_\_  
Signature

**For Internal Use:**

Date: \_\_\_\_\_ New/Existing Customer: \_\_\_\_\_ Port Number: \_\_\_\_\_  
Opening Deposit Amount: \_\_\_\_\_ Employee Initials: \_\_\_\_\_  
Account Number(s) assigned: \_\_\_\_\_

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