

Step 1: Account Transfer “To Do” List

We’ll make it quick and easy to transfer your account to Mountain West Bank. Simply use this handy “to do” checklist to help you make the switch! Please remember that there is sensitive information on the forms. If you are mailing your forms, put them in a mail receptacle at the post office. For your own safety and security, do not put the forms in your mailbox.

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

Account Number: _____

Mountain West Bank routing number is: 092001677

2. Switch direct deposit/automatic deposits using the **Authorization to Change Direct Deposit:**

- Employer deposit
- Government deposit
- Social Security Administration
- Brokerage deposits
- Child support/court-ordered deposits
- Other

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

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

4. Close all other savings, checking and bill payment accounts using the **Authorization to Close Account:**

Financial Institutions: _____

5. Additional options to explore:

- Refinance your auto loan with Mountain West Bank
- Refinance your mortgage loan with Mountain West Bank
- Get a home equity loan with Mountain West Bank

For additional details ~ or help transferring your accounts to Mountain West Bank ~ just ask us! We’ll be glad to assist. Please visit us or call a location near you.

Helena (406) 449-2265 / Great Falls (406) 771-7331 / Missoula (406) 542-6222 / Bozeman (406) 587-5600
Kalispell (406) 752-2265 / Whitefish (406) 863-2265

Step 2: Authorization to Change Direct Deposit

Instructions: Complete this authorization to change direct deposits to Mountain West Bank and provide a copy to your payroll office or any other company that makes automatic deposits to your account. Please remember that there is sensitive information on the forms. If you are mailing your forms, put them in a mail receptacle at the post office. For your own safety and security, do not put the forms in your mailbox.

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 Financial Institution: _____

Routing Number: _____

Account Number: _____

Please discontinue the above-referenced direct deposit and start direct deposit to my new account, effective immediately:

Mountain West Bank

Routing Number: _____

Account Number: _____ savings _____ checking _____

If you have any questions in regards to this request, please contact me at:

Phone number

Thank you!

Sincerely,

Signature

Name

Address

City/State/Zip

Step 3: Authorization to Change Automatic Withdrawal

Instructions: Complete this authorization to have automatic withdrawals made from your Mountain West 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! Please remember that there is sensitive information on the forms. If you are mailing your forms, put them in a mail receptacle at the post office. For your own safety and security, do not put the forms in your mailbox.

Date

Name of company making 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 Financial Institution: _____

Routing Number: _____

Account Number: _____ OR

Last 6 of Visa Check Card Number: _____

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

- Begin withdrawals from my account at:
Mountain West Bank
Routing Number: _____
Account Number: _____ savings _____ checking _____
- Begin withdrawals from my Mountain West Bank Visa Check Card.
Visa Card Number _____
Exp Date _____ CVV _____

If you have any questions in regards to this request, please contact me at:

Phone number

Thank you!
Sincerely,

Signature

Name

Address

City/State/Zip

Step 4: Authorization to Close Account

Instructions: Complete this authorization to close accounts at other financial institutions and have funds transferred to your Mountain West Bank account. Print one authorization form for each financial institution where you have accounts. Remember to destroy old checks, ATM and/or debit cards. Please remember that there is sensitive information on the forms. If you are mailing your forms, put them in a mail receptacle at the post office. For your own safety and security, do not put the forms in your mailbox.

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 Number: _____

Account Holder: _____

ID Verification (last 4 digits of SSN): _____

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

Mountain West Bank

Address: _____

City/State/Zip: _____

Routing number: _____

Account Number: _____ Savings__ Checking __

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 in regards to this request, please contact me at:

_____ during the ___ evening ___ day

Phone

Thank You!

Sincerely,

Signature

Name

Address

City/State/Zip