



*Switching to*  
**Independence Bank is easy!**

**SWITCH KIT**

**WE MAKE BANKING FAST AND FRIENDLY**

**Checking • Savings • CDs • IRAs • Health Savings Accounts**



**Independence**  
**BANK**

(800) 823-2274  
**ibyourbank.com**

**Banking on the Hi-Line**

HAVRE | MALTA | GLASGOW  
POPLAR | SCOBEEY | CONRAD

Member FDIC. Equal Housing Lender 





# It's as easy as *1, 2, 3...*

We want to make your move to Independence Bank as easy as possible. Our Switch Kit gives you three easy steps for opening your new accounts and transferring your automatic deposits and withdrawals.

1

## Open your Independence Bank account.

Complete the Account Information Form, print it out and bring it to your local Independence Bank. Please bring a government issued picture ID with you when you come in to open your account. Our New Account Representatives will help you choose the account that best fits your needs. For a new business account, please contact your local branch to check on additional information you will need to open an account.

**Helpful Hint:** At this time, stop using your old account and destroy unused checks, debit cards and deposit slips.

2

## Change your Direct Deposits.

If you are currently having your paycheck directly deposited into your bank account, you need to let your employer know you have a new account. Complete the Direct Deposit Change Form and submit it to your current employer.

**Helpful Hint:** If you are not using Direct Deposit for your paycheck, this is a great time to start! Use the Direct Deposit Change Form to start using this service today!

3

## Change your automatic payments.

If you have automatic payments coming out of your previous account (insurance premiums or loan payments), complete the Automatic Payment/Withdrawal Notice and forward it to all necessary vendors.

**Helpful Hint:** This is the perfect time to set up your online banking and bill pay! You can manage all of your bills and payments with IB online bill pay and have complete control over your finances. You'll love it!

**Our New Accounts staff is here to help you make the switch to Independence Bank. If you would like personal assistance throughout this process, we have the time to help you every step of the way. Just contact your local branch and we will make the switch as easy as 1, 2, 3.**

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# Step 1 Open Your Independence Bank Account

## I'd like to open...

- |  |  |
|--|--|
| <input type="checkbox"/> Personal Checking Account           | <input type="checkbox"/> Statement Savings Account                 |
| <input type="checkbox"/> Business Checking Account           | <input type="checkbox"/> Certificate of Deposit (CD)               |
| <input type="checkbox"/> Individual Retirement Account (IRA) | <input type="checkbox"/> Health Savings Account/MT Medical Account |

## This will be...

- |  |  |
|--|--|
| <input type="checkbox"/> An Individual Account | <input type="checkbox"/> A Joint Account |
|--|--|

### Primary Account Holder Information

First Name Middle Last

Street Address

Mailing Address (if different)

City, State, Zip

Home Phone Cell Phone

Email Address

Social Security Number Date of Birth M/D/YR

Employer

Occupation

Optional: To add a beneficiary (or beneficiaries) please have their legal name, date of birth and Social Security Number with you at account opening.

Signature

### Joint Account Holder Information

First Name Middle Last

Street Address

Mailing Address (if different)

City, State, Zip

Home Phone Cell Phone

Email Address

Social Security Number Date of Birth M/D/YR

Employer

Occupation

Signature



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**BANK**

## Step 2 Change Your Direct Deposits

Complete this form and submit it to any company or organization that is automatically depositing funds to your existing checking account (payroll, pension, or dividends).

**To:** Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

**To Whom It May Concern,**

**I've recently changed my banking relationship to Independence Bank. Please redirect my direct deposit into my new account:**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Social Security Number

**Independence Bank**

\_\_\_\_\_  
New Bank Name

**092901340**

\_\_\_\_\_  
New Bank Routing Number

\_\_\_\_\_  
New Bank Account Number

Account Type: ☐ Checking ☐ Savings

**I hereby authorize my direct deposit to be sent to my new Independence Bank account.  
I have attached a voided check or bank letter for reference.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Effective Date



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**BANK**

# Step 3 Change Your Automatic Payments

Complete this form and submit it to any company or organization that is automatically withdrawing funds from your existing checking account.

**To:** Company Name: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

Account/Policy Number: \_\_\_\_\_

☐ My current payment amount is \$ \_\_\_\_\_

☐ I am currently paying the total amount due.

## To Whom It May Concern,

**Effective \_\_/\_\_/\_\_\_\_, I hereby authorize my automatic payments to come from my account at Independence Bank.**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Address

\_\_\_\_\_  
City

\_\_\_\_\_  
State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Social Security Number

## Account Information

### Independence Bank

\_\_\_\_\_  
New Bank Name

**092901340**

\_\_\_\_\_  
New Bank Routing Number

\_\_\_\_\_  
New Bank Account Number

Account Type: ☐ Checking ☐ Savings

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date



**Independence**  
**BANK**