

Identity verified by:

Address Change Form

Please complete this form in its entirety. **In order to process this form, it must be signed.** We may contact you if we have any questions regarding these changes. Please include up to date information in the "Contact Information" section below. Each account owner complete an address change form.

Date address change to go into effect:	Date to expire addre	Date to expire address change (optional):			
Member Information:					
Name:	Date of Birth:	Member Number:			
Current/Previous Occupation:	Employment Status:	Employed	Unemployed	Retired	
Contact Information (at least one contact metho	d required):				
Email:	Pr	Preferred Contact Method:			
Cell Phone: Home Phone:		Work Phone:			
New Information:					
Address: C	City:	State:	Zip:		
Mailing Address if different than above:					
Address: C	City:	State:	Zip:		
Old information (For verification purposes):					
Address: C	City:	State:	Zip:		
Please select an option below regarding member	numbers to be change	d:			
Change the information ONLY for the member number listed above in the member information section.					
Change the information for ALL member numbers on which my name appears as an authorized signer/owner.					
Change the information for ONLY member numbers on which I am the primary holder.					
Change the information for the member numbers listed below:					
I authorize Montana Credit Unio	n to make the changes listed o	n this form.			
Member Signature:			Date:		
Completed form can be emailed to supportcenter@	Omontanacu com or mailed to	PO Box 5027 Great			
For Credit Union Use:	- manual to	. 5 55% 5027 Great			
Accepted By: Date:	Processed By:		Date:		

Last Updated: 8/27/2018

Step 1 - Update Address

Episys

Search SSN, looking for additional accounts

Update Primary Physical Address, all accounts

Update Primary Mailing Address, all accounts

Update Joint Physical Address, all accounts

Update Joint Mailing Address, all accounts

Update Phone Numbers, Occupations & Email address, all accounts

Enter Zip + 4 on Form

Update Loan Record Addresses, all accounts

Add warning code (59) Address Recently Changed

Check for Bad Address Warning OR N/A

Change Statement Mail Code

Expire Bad Address Warning Code (Flashing Warning)

Delete (Not Expire) Return Mail Note

Check for WINcentive® Savings OR N/A

Verify Primary Physical Address is in MT OR Out-of-State

Out-of-State - Notify Member Services OR N/A

Reinstate ODT OR N/A

Update Address in Liberty OR N/A

Update Address in Bill Pay OR N/A

Update Address in Ascensus OR N/A

Update Address in CuMont Site OR N/A

Complete Return Mail Process OR N/A

The above tasks have been completed by:

Employee Initials:

Step 2 - Scan and Verify

Scan Form & Photo ID into Synergy Capture

Index

Quality Control Check in Episys

The above tasks have been completed by:

Employee Initials: