



Montana
CREDIT UNION

SWITCH
SWITCH
SWITCH Kit
SWITCH
SWITCH

GUIDING YOU AHEAD

A Better Way Starts Here

Montana Credit Union is a full-service financial institution and the largest local credit union in the area. With a host of products and services built with our members' needs in mind, we pride ourselves on being *rooted in Montana to better serve you.*

STEP
1

Open your new MCU account.

When you are ready to make the switch to Montana Credit Union, please stop by and see us. All you need to bring with you in order to open a new account is a **valid photo ID with your current residential address**. If your ID does not have your current residential address, we may ask for some additional information to verify your address.

STEP
2

Switch over your direct deposits and automatic withdrawals.

If you have automatic transactions, use the provided forms to seamlessly switch them to Montana CU. Please note - **some automatic deposits and payments may take a while to switch over.**

STEP
3

Close your old account.

Fill out provided forms from your old institution to fully close your old account. Any remaining account balances can be transferred to your new MCU account. **Please keep your old account open until all current direct deposits and automatic withdrawals have been switched over to your new MCU account.**



406.727.2210 | montanacu.com

ACCOUNT SERVICES

Members receive a plethora of services upon opening an account with Montana Credit Union. With friendly, trustworthy and local service, MCU supplies you with time saving tools to better **guide you ahead.**

Free Checking Account

Manage your money easier with a MCU checking account. With personalized checking accounts for every member you can keep it simple while spending wisely.



Debit Card

Spend in style with a sleek, instant-issue debit card giving you access to your checking account funds wherever you may be.



Digital Wallet

Securely pay for items and transactions using your phone instead of using cash or your debit card at participating merchants. MCU digital wallet is available through Google Pay, Samsung Pay and Apple Pay.



Digital Banking

Bank wherever you have an Internet connection, for free, 24/7. Whether that be on your cellular device, or your home computer, you can bank on your time, when it works for you.



Credit Card

A second spending option that's both safe and secure. With flexible anytime funds you can keep spending local with a competitive 11.9% APR.



SWITCH DIRECT DEPOSITS

Direct Deposits

My Name

Address

City

State

Zip Code

Phone

Email

Employer

Fill out this section to change **Direct Deposit**:

Please change my direct deposit to:

Checking Account

Savings Account

Montana Credit Union
PO Box 5027
Great Falls, MT 59403

Account #

Routing #

292977336

Previous Financial Institution

City

State

Zip Code

Phone

Previous Account #

Previous Routing #

Name

Signature

Date

Fill out this section if you need to change a **second Direct Deposit**:

Please change my direct deposit to:

Checking Account

Savings Account

Montana Credit Union
PO Box 5027
Great Falls, MT 59403

Account #

Routing #

292977336

Previous Financial Institution

City

State

Zip Code

Phone

Previous Account #

Previous Routing #

Name

Signature

Date



CHANGE AUTOMATIC PAYMENT

Automatic Payments

My Name

Address

City

State

Zip Code

Phone

Email

Employer

Fill out this section to change **Automatic Payment**:

Please change my automatic payment to: Checking Account Savings Account

Montana Credit Union
#15 14th Street South
Great Falls, MT 59401

Account #

Routing #

292977336

Company Name

Address

City

State

Zip Code

Company Account #

Effective(MM/DD/YY)

Signature

Date

Fill out this section if you need to change a **second Automatic Payment**

Please change my automatic payment to: Checking Account Savings Account

Montana Credit Union
#15 14th Street South
Great Falls, MT 59401

Account #

Routing #

292977336

Company Name

Address

City

State

Zip Code

Company Account #

Effective(MM/DD/YY)

Signature

Date



RESOURCES

Automatic Withdrawal Checklist

- | | |
|---|--|
| <input type="checkbox"/> Home Mortgage | <input type="checkbox"/> Gym/Club Membership |
| <input type="checkbox"/> Auto Loan | <input type="checkbox"/> Investments |
| <input type="checkbox"/> Utilities | <input type="checkbox"/> Subscriptions |
| <input type="checkbox"/> Insurance | <input type="checkbox"/> Charity Donations |
| <input type="checkbox"/> Cable/Internet | <input type="checkbox"/> Credit Cards |

Close Accounts at Other Financial Institutions

My Name _____

Address _____ City _____ State _____ Zip Code _____

Phone _____ Email _____

Please close my account at:

Financial Institution _____

City _____ State _____ Country _____ Zip Code _____

Phone _____ Account # _____ Routing # _____

Cash out the current account and transfer the proceeds as follows.

Amount to transfer (select one):

- \$ _____
- The entire amount in my account and close my account.
Account # _____
- Mail the remaining balance of my account to the mailing address above.
- Mail the remaining balance of my account to be deposited at MCU to:
Montana Credit Union
PO Box 5027
Great Falls, MT 59403

Make this transfer (select one):

- On (MM/DD/YY) _____
- Immediately
- At maturity of the investment
- Checking Account Savings Account
- Account # _____
- Routing # 292977336

Signature _____

Date _____

